

# UTAH PUBLIC LIBRARY

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## TRUSTEE MANUAL

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Utah State Library Division  
Donna Jones Morris, Division Director/State Librarian  
April 2009





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Department of Community and Culture

Utah State Library Division

Donna Jones Morris, Division Director/State Librarian

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April 2009

<http://library.utah.gov>



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Dear Library Trustee:

On behalf of the Utah State Library, I want to take this opportunity to personally welcome you to the community of public libraries in Utah and congratulate you on your appointment to your public library's Board of Directors! You have been chosen for this important post because of your interest in providing excellent library service to your community and because you are a person with the intellect and commitment to help your library move forward in maintaining and improving that service.

The purpose of this manual is to serve as a guide to help make your experience as a member of the board a satisfying one, both for you and for your library constituents. It is important that you understand the strengths and the obligations of your board position. Your job is much more than meeting once a month and casting a vote every now and then. It means being an advocate for your library, participating actively in the planning process, and working cooperatively with your library administration and government officials in developing policies to serve your community. You will be supporting and encouraging your library director in his/her efforts to manage the daily operations of the library. Be prepared to attend board meetings and contribute positively to group deliberations. It is your responsibility, as a public library board member, to support library needs at the local, state and national levels.

Consultants at the Utah State Library are here to help you and your library administration. We invite you to attend training opportunities in all areas of library service, including training specifically developed for board members. Our consultants, our training, and this manual will help you become knowledgeable about funding opportunities, library "best practices", and how to be a better board member.

Thank you for joining us in our mission of providing the best possible library service to Utahns.

Best regards,

A handwritten signature in cursive script that reads "Donna Jones Morris".

Donna Jones Morris  
State Librarian/Division Director



## SECTION I – GENERAL

### Chapter 1 Trusteeship

Congratulations on your appointment to the board of trustees for your local public library. It will soon become apparent that your new position requires dedication, knowledge and accountability, just like any other job. Take time at the beginning of your appointment to become acquainted with the roles, responsibilities and special powers assigned to library trustees. You are in for a very rewarding experience.

*As trustees of libraries, we have been entrusted with the noblest task of all – to preserve, strengthen, and promote the growth and use of our community's libraries. We must maintain the heritage that libraries hold for the future good of our society. The library for which we work today will long outlive us and will provide inspiration and encouragement for generations to come. ... As the Information Age progresses, libraries are more than ever important to the maintenance of civilization as we know it and as we wish it to be.*  
(Jane Bellon, Illinois Trustee Facts File, 1997 edition, p.1)

#### Public Tradition and Public Trust

The library board is established by Utah law. Library trustees are public officials and the powers delegated to library boards are a public trust. Library trustees are the eyes and ears of the community. They bring the citizens' perspective to board business.

*Public Library trusteeship is a fundamental part of the American tradition which holds that in the long run the people control their public institutions. One of the most democratic of American political traditions is to give the legal authority for the operation of public agencies to boards made up of members of the general public... Thus, the public library board is not just another social organization. It is an example of a great democratic tradition. Being a library board member, then, is not just an honor. It is a responsibility.*  
(The Idaho Library Trustee Manual. 1996 edition, p. 1).

#### Trustee Responsibilities in Utah

Over 500 residents serve on Utah public library boards ensuring that quality library and information services are available to all people in the State. Utah trustees are responsible for establishing a long-range plan for their library, actively promoting the library, setting policies to serve community interests, and advocating for library issues. In addition, boards oversee public funds and work to retain a qualified director. Trustees support their library's efforts to meet State standards for certified library service. Contact the State Library to learn more about trusteeship in Utah.

#### Trustee/Board Member

The correct designation for your appointment may be either "library board director", "trustee" or "board member", and you are member of a legally appointed board. The Utah Code refers to the library board entity as the "library board of directors". Trustee and board member have the same meaning and are used interchangeably, to avoid confusion with the library employee hired as Library Director.



## SECTION II – LEGAL

### Chapter 2 Legal Responsibilities

#### Statutory Powers

County and city library boards have similar roles, but there are subtle differences in their legal standing. Following is a comparison of the roles of the two groups as outlined in the Utah Code. For information on managing library board appointments and terms of service, see [Library Board Terms](#) in the Appendix material in this manual.

<b>City Library Board Duties</b> <b><u>(Section 9-7-401 – 410, UCA)</u></b>	<b>County Library Board Duties</b> <b><u>(Section 9-7-501 – 511, UCA)</u></b>
<p>With the approval of city government,</p> <ul style="list-style-type: none"> <li>• the Board may control the expenditure of the library fund, of construction, lease, or sale of library buildings and land, and oversee the operation and care of the library.</li> <li>• the Board may purchase, lease, or sell land, and purchase, lease, build, or sell buildings for the benefit of the library.</li> </ul>	<p>With the approval of the county executive and in accordance with county ordinances, policies, and procedures,</p> <ul style="list-style-type: none"> <li>• the Board will be responsible for expenditure of the library fund, the construction, lease, or sale of library buildings and land, and the operation and care of the library.</li> <li>• The Board will purchase, lease, or sell land, and purchase, lease, construct, or sell buildings, for the benefit of the library.</li> </ul>
The Board will maintain and care for the library and establish policies for its operation.	The Board has the powers and duties given to it by county ordinance, including the establishment of policies for collections and information resources.
The Board will make, amend, and revoke rules for the governing of the library.	The Board will make rules, “consistent with county ordinances, policies, and procedures for the governing of the library”.
The Board will make an annual report to the city government on the condition and operation of the library.	The Board will make an annual report to the county executive and the county legislative body on the condition and operation of the library, including a financial statement.
The Board will appoint a library director who will be “executive officer” for the Board. The Board will appoint other personnel upon the recommendation of the library director.	The Board will recommend to the county executive a person to serve as library director, who will be “executive officer” for the Board. The Library Director will hire library personnel in accordance with County merit system.



The Board will control donations to the library and act as the trustees of the donation if in the form of property.	Donations are made to the county government, "designated for the benefit and purposes of the library".
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**Specifically for City Library Board Members**

As a city library board member, you have been chosen by your city governing body. Your board will have between 5 and 9 members who live in the city jurisdiction, are capable individuals, and are interested in good library service. Local laws may stipulate that the mayor and/or city council choose board members based upon formulas designed to ensure geographic, ethnic, or income diversity. There will likely be a member of the City Council on your Board. His / Her roles include bringing the city's political agenda to the table, ensuring that the Board is following local laws, and contributing effort and expertise to improve library service as a fellow board member.

You will not be paid for your service, except that expenses incurred doing board assignments may be reimbursed from library funds. You will be asked to serve for at least 3 years (1 term) and no more than 6 consecutive years. You and the other board members will select a chairman and any other offices you agree to every year. The mayor and / or city council can remove you if you are guilty of misconduct or if you neglect your Board assignment.

As a city library board member, you are part of a group that, within the constraints set by your city government, has the power to:

- 1) decide how to spend library dollars for library buildings, maintenance, land purchase, and operation; your board is the caretaker of the library and its assets for the people of your city;
- 2) accept and control donations made for the benefit of the library;
- 3) establish policies for the library; you will decide the future direction of your library and how it serves its public, including the establishment of rules for patron behavior and access; and
- 4) appoint a Library Director\* and decide what he / she will do and how much money he / she will be paid; the library director is the executive officer for your board and will manage the day-to-day operations of the library.

(\* Note: In the majority of towns and cities, hiring and salary administration is a function of the municipal personnel system. Usually, the library board recommends a candidate and local government "appoints" the employee).

**Specifically for County Library Board Members**

As a county library board member, you have been chosen by your county governing body. Your board will have between 5 and 9 members who live in the county and are interested in good library service. Local laws may stipulate that the mayor and / or county council choose board members based upon formulas designed to ensure geographic, ethnic, or income diversity. There will be a member of the County Commission on your Board. His / Her roles include bringing the county's political agenda to the table, ensuring that the Board is following local laws, and contributing effort and expertise to improve library service as a fellow board member.



You will not be paid for your service, except that expenses incurred doing board assignments may be reimbursed from library funds.

You will be asked to serve for at least 4 years (1 term) and no more than 8 consecutive years. You and the other board members will select a chairman and any other offices you agree to every year.

The County Executive can remove you if you are guilty of misconduct or if you neglect your Board assignment.

As a county library board member, you are part of a group that, within the constraints set by county laws, has the power to:

- 1) decide how to spend library dollars for library buildings, maintenance, land purchase, and operation; your board is the caretaker of the library and its assets for the people of your county;
- 2) establish policies for the library; you will decide the future direction of your library and how it serves its public, including the establishment of rules for patron behavior and access; and
- 3) recommend a Library Director to the County Executive; the library director is the executive officer for your board and will manage the day-to-day operations of the library.

### **Liability Protection**

As a legally appointed public officer, you are protected from lawsuits against actions you take in performance of your official duties. [Utah Code, Title 63G - Chapter 07 - Governmental Immunity Act of Utah](#), describes the conditions of immunity applicable to government officers and trustees.

### **Open Meetings**

All meetings of a public body, such as a library board, must be advertised in public media/forum and open to the public. [Utah Code, Title 52 – Chapter 4 - Open and Public Meetings Act](#), clearly states that meetings concerning the public’s business must be conducted openly. Only under certain conditions, such as, discussion of personnel issues, sale of property, or legal actions, may board meetings be closed to the public ([Section 52-4-205, UCA](#)). This Statute also imposes a class B misdemeanor penalty for “... a member of a public body who knowingly or intentionally violates or ... abets ... any of the closed meeting provisions of this chapter ... ” ([Section 52-4-305, UCA](#)).

### **Library Laws of Utah**

The State Library maintains an online quick reference guide to [Utah Library Laws](#). It is always advisable for boards to obtain an opinion from their local attorney for correct understanding and interpretation of these laws when applied to a specific situation.



## Chapter 3 Code of Ethics

The public expects and laws require that your performance will always be above question and for the public good. Boards should adopt a code of ethics to guide the conduct of its members and then review it whenever a new board member is appointed. A code of ethics reinforces a trustee's obligation to refrain from taking any official action that produces a substantial financial benefit to the trustee, the trustee's family, or an organization in which the trustee has a significant financial interest. Individual trustees may not negotiate or bid for or enter into a contract in which he/she has a direct or indirect financial interest.

### Ethics for Utah Public Officers

[Utah Code, Title 67 – Chapter 16 - Utah Public Officers' and Employees' Ethics Act](#), sets forth standards of conduct for officers and employees of the State of Utah and its political subdivisions in areas where there are actual or potential conflicts of interest between their public duties and their private interests. The Code further prohibits public officers from improperly disclosing or using private, controlled or protected information, accepting gifts, compensation or loans, or requiring payment in exchange for approvals.

### Ethics Statement for Public Library Trustees

Adopted by the American Library Association and the Public Library Association.

- Trustees must promote a high level of library service while observing ethical standards.
- Trustees must avoid situations in which personal interests might be served or financial benefits gained at the expense of library users, colleagues, or the institution.
- It is incumbent upon any trustee to disqualify him or her self immediately whenever the appearance of a conflict of interest exists.
- Trustees must distinguish clearly in their actions and statements between their personal philosophies and attitudes and those of the institution, acknowledging the formal position of the board even if they personally disagree.
- A trustee must respect the confidential nature of library business while being aware of and in compliance with applicable laws governing freedom of information.
- Trustees must be prepared to support to the fullest, the efforts of librarians in resisting censorship of library materials by special interest groups or individuals.
- Trustees who accept appointment to a library board are expected to perform all the functions of library trustees.

## SECTION III – REGULATORY

### Chapter 4 Organization and Meetings

Building a strong library board does not happen by accident. It takes time, patience, good business practices, and team effort. Conducting board business means following your bylaws, supporting group decision making, and doing your part to make meetings effective and worthwhile.

#### Bylaw Basics

Well-crafted bylaws help provide for the smooth and effective functioning of a library board. The bylaws are a set of rules that define the operational procedures of the board. The bylaws of a public library board in Utah must not conflict with federal or state laws or local ordinances. Boards should review bylaws annually and amend them as necessary.

#### Sample Bylaws

- The name of the board
- The constituency served by the library and its board
- The composition of the board
- Procedure for election or appointment of board trustees
- Terms of board trustees
- Procedure for filling an unexpired trustee term
- The schedule (frequency) of board meetings
- Procedure for calling special meetings of the board
- Specification of a quorum

(See Appendix Material for another example of board bylaws.)

#### Working as a Board

- **Full board authority:** Board members do not have authority as individuals. A library board committee cannot act on behalf of the full board. Only actions approved by the full board have legal authority. Likewise, individual board members and board officers can perform official actions on behalf of the board only with specific authorization from the full board. Normally, a majority of the membership of a library board constitutes a quorum, but the library board may establish its own definition of a quorum (the minimum number of members that must be present to conduct business) in its bylaws.
- **Collective decision making:** Legal responsibility for overall library operations rests in the library board, not individual trustees. Therefore, it is important for the board president to use leadership techniques that promote effective group decision making on the part of the entire library board, not decision making by a few board members, or the library director, or any other individual.
- **Voting rights:** Only legally appointed library board members can vote on board matters. Some library boards may consider certain officials *ex officio* board members, such as the library director or city manager. However, no



other government official or person who is not appointed to the board is legally authorized to vote on library board matters.

## Meaningful Meetings

### Preparing the Agenda

A well-run board meeting depends on a carefully planned agenda. The board chairperson and library director should work together in preparing materials to be sent out to board members at least one week before each meeting. Typically, the library director will contact the library board president to discuss planned agenda subjects, including any items required because of previous board action. The chairperson may add agenda items and board members wishing to have an item brought before the full group should contact their board chairperson. An annual library board calendar can help ensure that your board will meet important deadlines. Board members can contribute best if they have taken the time to adequately study the agenda and background materials *before* each meeting.

### Sample Agenda

- Call to order
- Roll call and introductions
- Approval of minutes of previous meeting
- Reports: (These will vary throughout the year. Reports may be distributed to members in advance to save time.) Example of reports:
  - Library director's report
  - Financial report
  - Standing committees
  - Special committees
- Unfinished business
  - Action Items
- New business
- Adjournment

## Tips for Conducting Meetings

### Before Meetings

- Be thoroughly familiar with [Sections 52-4-101 through 305, UCA](#), regarding Utah's Open and Public Meetings Act.
- Plan meetings on a regular annual schedule as stated in your board's bylaws. Establish dates (or recurring days of the month), time, and place.
- Prepare the agenda in advance. The Library board chair and the library director should cooperatively plan the agenda.
- Publish and post notice of meetings in accordance with Utah Code requirements: [Section 52-4-202, UCA](#).
- Distribute the agenda and written reports at least 7 days in advance of a meeting.



## Beginning the Meeting

- The Board chair plans and presides over board meetings.
- Start on time with roll call of board members. A quorum is necessary to conduct board business.
- Introduce visitors and/or new board members.
- Ensure that a recorder is appointed to take minutes.
- Approve minutes of the previous meeting.
- Review, revise, and order agenda. Set time limits for each item.

## Conducting the Meeting

- Follow the agenda and the established order of business.
- Lead actively. Keep discussions moving along and on track.
- Solicit opinions from everyone on the board.

## Ending the Meeting

- Review the meeting progress and any decisions made.
- Establish action items. Who will do what, and by when.
- Confirm the next meeting date, time and place.
- Officially adjourn the meeting, and end on time.

## Taking Minutes

**Minutes as a public record:** In accordance with [Section 52-4-203, UCA](#), minutes of each board meeting constitute a public record subject to GRAMA regulations. Minutes must include; the date, time, and place of the meeting; the names of members present and absent; the substance of all matters proposed, discussed, or decided by the public body which may include a summary of comments made by members of the public body; and a record, by individual member, of each vote taken by the public body. Written minutes shall be available to the public within a reasonable time after the end of the meeting. However, just taking minutes does not finalize the record. The written minutes become the official record of board proceedings after minutes have been approved by the board. The board must have in effect a policy for approval of Board meeting minutes.

**Recording minutes:** In accordance with [Section 52-4-203, UCA](#), "... written minutes and a recording shall be kept of all open meetings." A recording of an open meeting shall be a complete and unedited record of all open portions of the meeting from the commencement of the meeting through adjournment of the meeting; and be properly labeled or identified with the date, time, and place of the meeting. A recording of an open meeting shall be available to the public for listening within three business days after the end of the meeting.

**Robert's Rules of Order** – Quick Summary <http://www.robertsrules.org/> if your board chooses to use them.



## Chapter 5 Strategic Planning

The State Library requires all certified public libraries to submit a comprehensive three-year plan, approved by the board, which addresses all aspects of library services, programs, infrastructure and technology. Planning for the library's future is a basic duty of the board. To obtain a broad vision of potential roles for the library, the board can work with stakeholders in the community. There are many talented individuals in any community willing to lend their expertise to the library planning process. Library statistical data collected in the [State Library Annual Report](#) can be used to evaluate a library's performance in a number of service categories.

### The Purpose of Planning

Planning focuses attention on attainable goals and objectives. It sets the direction for the library and identifies its service roles. A good long-range plan is visionary, but based on a real analysis of community needs and interests. The Public Library Association of ALA has proposed 18 Service Response Roles from which all library services emerge. (See Appendix Material, page 45.) The plan should set general directions but be flexible to adapt to changing circumstances. Most importantly, the plan should establish action items and assign library resources, plus establish accountability.

Planning involves answering basic questions, including:

- What is our role in the community?
- What is our purpose? What does success look like for us?
- Who do we serve, and what do our customers want from us?
- Where are we now, and where do we want to be next year, and in future years?
- How will we get there, and what is our timetable?
- What staff, money, equipment and other resources will we need to achieve our planned goals and objectives?

### Reporting on Your Plan

A library should have both a long-range plan and an annual work plan. The annual plan is derived from the long-range goals. Libraries are required to file their most current strategic plan with the State Library. The State Library recommends that libraries indicate in their plan if they will rely on grant funds (federal or state) to achieve their objectives.

### A Planning Resource – The Annual Statistical Report

The State Library annually collects statistics from the State's public libraries. This report is mandated in the Utah Code for both city and county libraries. The data is used to prepare a statewide report on Utah's public libraries. Utah's report is added to a federal database, the Federal/State Cooperative System for Public Library Data (FSCS). Local libraries will find the annual report data useful for comparing and contrasting their own library's performance with peer group libraries within Utah, as well as out of state. [Library statistics](#) can be reviewed on the State Library's web site. The library director should be familiar with procedures for submitting the annual report, but video tutorial assistance is available through the State Library website.



## Chapter 6 Budgeting and Finance

A major board responsibility is to take the lead in efforts to secure adequate funding for the library. To be successful, board members must understand how funds are allocated to the library by their city or county government. From time to time, trustees will need to investigate additional sources of revenue in order to help fund special projects or build a capital reserve for long-range needs. The board may appoint a standing committee dedicated to finances and fundraising.

### How are Libraries Funded?

It is the trustee's responsibility and duty to understand the details of their library's funding situation, the sources of their funds, and the county or municipal library budget process. Most public libraries are funded by public property taxes and/or other special taxes unique to a local jurisdiction. Often, it is necessary to supplement public funds with outside resources.

**Tax Support:** In Utah, local governments have two options for funding libraries through public monies. A dedicated library tax may be levied that is limited to .001 of the assessed valuation of taxable property within that jurisdiction. Or, in lieu of a dedicated library tax, the jurisdiction may fund library service from the local government general fund. This means that libraries reapply for their budget amounts each year, just as other departments dependent on the general fund. The standards for certified libraries require that the local funding authority provide funds for library operations in consecutive years that qualify as "Maintenance of Effort" support, as defined in State Library Board approved certification criteria.

**Supplemental Funds:** Some of the resources that libraries have available to acquire supplemental funds include, Utah Community Library Enhancement Fund (CLEF) grants; LSTA, E-RATE and other federal grants; and contributions from library support groups or planned giving campaigns. City library boards have the authority to maintain custody of gifts, bequests, and endowment funds and to approve expenditures from those funds. Gifts and donations to a county library are made to the county, designated for the benefit and purposes of the library. (Actual disbursements are generally made by the local government treasurer.)

### The Budget Development Process

Budgeting and planning are interwoven. The budget should be viewed as a planning tool, the map that the library follows during a fiscal period to attain its mission and planning goals. The first step in developing a library budget is to look at what the library hopes to accomplish in the coming year and the years ahead. The availability of a current long-range plan will make this step much easier because the plan should already document your community's library service needs and the library activities necessary to meet those needs.



The second step is to determine the total financial resources necessary for what the library wants to accomplish in the coming year. Often, increased funding is necessary because of increased costs, increased usage, and/or new services that will be offered.

### **Advocating for the Budget**

The library director and staff draft budget documents following the format required by the municipality or county. The library board and/or library board finance committee may have input into development of budget drafts. The board of trustees will then review the draft budget with the director, propose changes, and finally approve a finished budget.

After the written budget documents are approved by the board and submitted to the municipality or county, the final step in the budget process is securing the funding needed to carry out the planned service program. Trustees, as volunteer public representatives, are especially effective budget advocates. Trustees should be involved in presenting, explaining, and supporting the library budget that was approved by the library board.

When presenting the budget, tell your story and make your case. Don't just document the need for budget increases, but justify the base as well. Tell your government funders, the media, and your community who uses library services and what impact the library makes in their lives.

## Chapter 7 Policy Making

Library policies are important tools used by library trustees and staff to provide effective service to the community. Policies reflect the library's philosophy of service and explain the reasons for setting rules and limitations. To be effective and justifiable, policies must be well-designed, well-written, and capable of being applied consistently and fairly.

### What are Policies?

Policies are broadly stated, written guidelines for decision making that are formally adopted by the board. The library board must approve all policies in properly advertised public meetings. Library policies should promote the best interests of the community and be consistent with the library's mission and long-range plan.

It is important for policies to be legal, clear, and reasonable. All ramifications must be understood, including the effects on the public image of the library. Policy language and intent can affect enforceability. Prior to adoption of a new policy or when amendments are proposed, boards should submit the policy drafts to their local government legal counsel for review.

### Why are Policies Needed?

Policies guide the daily operations of the library and provide the framework for decision making by the library director and staff. Like other public institutions, a library must endeavor to meet public expectations in a consistent, fair and efficient way. A comprehensive set of well-defined, well-written policies is important to a public library because policies guide trustees and library staff in carrying out their duties; help ensure high-quality service to meet community needs; communicate privileges and duties regarding library use to the public; help ensure fair treatment of all patrons and staff; and help ensure conformity to local, state, and federal laws.

### Who Makes Policy?

The crafting of a specific policy is usually prompted by a particular problem or need brought to the attention of the board by the library director or member of the public. The library director, with staff input, researches and drafts recommended policies. The board discusses, revises if necessary, and approves policies. The director makes sure staff and public are aware of policies. The board should review policies on a regular cycle so all policies are reviewed at least every three years. For example, one or two policies could be studied per meeting until all of the policies have been reviewed and updated if necessary.

### Policies and Public Access

By law, library policies must be accessible to the public. Most libraries collect their policies in an easy-to-update ring binder or maintain their policies on the library web site. Each policy should have a reference to the date of board adoption or revision. Board members may wish to have their own copies of the policy manual or at least know where to find the policies.



## Chapter 8 Internet Services and Privacy

### Internet in the Library

Public library access to the Internet has presented new challenges for library directors and boards. Providing public access to the Internet has helped libraries draw a new influx of customers, improve access to materials previously only found in larger libraries, and helped make access to technology more equitable. The public expects to find online resources fully integrated with traditional library services. On the other hand, when the Internet is used in a public space funded by public tax dollars, libraries are compelled to adopt policies specific to Internet use that meet several legal tests.

### Library Policies and Legal Issues

Access to the Internet in the public library has brought with it greater state and federal involvement in the implementation of policies designed to block access to visual materials that are obscene, harmful to minors, or child pornography. The Federal [Children's Internet Protection Act](#) (CIPA) mandates Internet filters on library computers used by minors in order for a library to receive LSTA or E-Rate funds. The [Utah Children's Internet Protection Act](#) issues a similar mandate to libraries in order to receive Community Library Enhancement Fund (CLEF) funds. Utah libraries are required to have a current Internet and Online Access Policy on file with the State Library. The library's Internet policy must be reviewed and re-adopted by the board every three years, beginning July 1, 2001. A lot hinges on this most important policy: 1) your library's eligible for Federal and/or State funds, 2) the library director's and staff's ability to deal effectively with patron Internet usage, 3) the library's ability to respond to challenges to the policy and possible legal actions, and 4) the library's continued recertification, with associated entitlements.

### Intellectual Freedom

Public libraries are institutions dedicated to the ideal of freedom of expression and inquiry with access for all citizens to a full range of ideas, including controversial or unpopular ideas. As a library trustee, your commitment to freedom of information will be frequently challenged. You may be asked to tolerate ideas that offend your sensibilities or cause conflict with your personal beliefs. But, as a library trustee, you are expected to defend public access to such information. Federal and state courts have invoked the First Amendment countless times in support of the principle of freedom of information. This basic right of every citizen to have unrestrained access to all kinds of information is also known as Intellectual Freedom. Library boards should also know the legal limitations of this Constitutional freedom.

### Patrons' Right to Privacy

Another cherished library tradition is unwavering support for library patrons' right to privacy. Individuals who access information in public libraries expect their reading and information records to be kept private. Most circulation systems purge the patron's check out history when materials are returned leaving only the current usage record accessible. Patron registration records are classified as "private records" and protected from random, public disclosure by Utah's GRAMA law.



## **GRAMA and Records Sharing**

GRAMA ([Utah Code - Title 63G – Chapter 2 - Government Records Access and Management Act](#)) protects the privacy rights of library patrons. The law restricts public access to “records of publicly funded libraries that when examined alone or with other records identify a patron” ([Section 63G-2-302-1c](#)). GRAMA permits some sharing of private, controlled or protected records among government entities, but states very clearly that the records of publicly funded libraries “may not be shared under this section” ([Section 63G-2-206-8b](#)). Libraries should correctly require a court order or subpoena before disclosing any information about patron records and should immediately contact their local attorney for guidance. Boards should adopt a policy covering the procedures for handling requests for patron information and ensure that the director and staff are fully trained on how to respond to this issue.

Confidentiality of a minor’s reading record is another issue that libraries are greatly concerned about. Utah does not have a specific law in this regard, but boards should consider developing individual library policies detailing how they will handle requests for library information on minors’ reading records.

## **Law Enforcement Requests**

Law enforcement officials may legally gain access to library records in either of two ways: by executing a court issued subpoena, or by obtaining a search warrant from a judge. Ideally, the library administration (trustees and library director) will have developed a policy for responding to requests for information from law enforcement authorities before such time as a search warrant may be presented.

## **The Patriot Act and Library Records**

With implementation of the [USA PATRIOT ACT \(PL 107-56\)](#), passed by Congress in the wake of the September 11, 2001 terrorist attacks on the United States, the possibility that library staff might be presented with a search warrant has increased. The U.S. Attorney General has issued revised guidelines expanding the FBI’s investigative powers, which allow for very broad surveillance of library users and their activities.

Since the anti-terrorism law requires the FBI to obtain a search warrant or court order before requesting records, there does not appear to be a conflict between the federal law and state confidentiality laws. More information about the Patriot Act and its possible ramifications for libraries can be found at the [American Library Association web site](#).



## Chapter 9 Hiring a Director

Hiring a library director is one of the most challenging and rewarding jobs that a library board can undertake. In the process of hiring a new director, boards should do their homework and learn about the preferred skills and qualifications for library directors and be conversant with market salaries and benefits. Each board will seek a director with qualities, strengths, and professional background that meets their own library's particular circumstances. In all phases of the recruitment and selection process, boards must adhere to legal hiring practices.

### Qualifications

The Utah Code does not require licensing for a library director. The Code stipulates that city and county library boards "must appoint a competent person as librarian ... with compensation for services". County governments clearly have the hiring authority to appoint a candidate recommended by the county library board ([Section 9-7-507, UCA](#)). On the other hand, the Utah Code reads that city library boards appoint the library director ([Section 9-7-407, UCA](#)). In view of the way municipal government operates today, it is most likely that the funding authority does the actual hiring and compensating, unless the municipal library has been given specific powers for library personnel services. City officials will rely on the city library board to recommend a qualified and competent candidate to become library director.

To determine the desirable qualifications of a library director, each community needs to go the extra mile to determine its priorities and find the best person for their circumstances. The board can seek help from the local government human resources office or the attorney's office for up-to-date information on local hiring policies, salary and benefits. For additional advice on recruitment and selection of a director, contact the [Utah State Library](#) for professional literature and consulting service, or contact one of [Utah's other libraries](#).

### What to Look for in a New Director

When seeking a director, some boards place more emphasis on imagination and energy, others on administrative experience, still others on education. Local conditions, the library's size, staff, and resources, also affect selection. The director is responsible both for day-to-day management of the organization, and for assisting the library board with "big picture" issues like planning and policy making. In developing the job description and assessing candidates, a board may consider the following:

- experience working with library boards and governing bodies;
- knowledge of budget preparation, policy development, administration, and employee supervision;
- library experience in areas such as public service, technical services, public relations, and computer applications; and
- demonstrated leadership ability and dependability.



## **Preparing to Hire the Director**

The first step is to appoint an interim director who will have full authority while the search for a director is underway. The interim director should be paid at the director salary level.

The prospect of new library leadership offers the library board an opportunity to assess the library and its current needs. The board should review the library's long-range plan and be able to describe the library's future to prospective candidates. The board will want to appoint a subcommittee to conduct the director search and to screen and interview candidates. The committee will recommend final candidates to the full board.

## **Hiring the Library Director**

Once the selection of a new director has been made, the director will be subject to the personnel regulations and benefits administered by the local government. The board may want to develop a written agreement that spells out the expectations of the board for the director's performance. An annual work plan for the director is an essential document that carefully establishes measurable expectations that form the basis for evaluations. To ensure a smooth transition and ensure goals are on track, the board should evaluate a new director within the first six months of employment, and annually thereafter.

## Chapter 10 State Certification and Grants

In Utah, all public libraries are evaluated according to a set of legal requirements and professional practices known as [Public Library Certification Standards](#). The standards are developed by the State Library and approved by the State Library Board to provide uniformity in assessing the quality of service provided by libraries in different communities, and to help local libraries measure their own performance. Library boards should understand the purpose and benefits of the standards and know that many State and federal grant opportunities are tied to certification status. If a volunteer library wishes to become certified, the library must first meet all the standards required for legal governance and public funding. The State Library will provide a consultant to work with non-certified public libraries seeking certification.

### What are Certification Standards?

Once a library is established by either a city or county jurisdiction and desires to achieve certification, it is asked to meet a set of guidelines called certification standards, established by the Utah State Library Board as empowered by [Section 9-7-205\(1\)\(n\), UCA](#). Standards describe the required levels of performance in crucial areas of library operations including; governance, funding, personnel, collections, public access, technology, and more. Standards help ensure conformance to professionally accepted practices and establish benchmarks for libraries to work toward to improve service over time.

### Certification Benefits

Only certified public libraries are eligible for the Community Library Enhancement Fund (CLEF) grant. Only certified public libraries may apply for federal grants, such as LSTA and E-Rate discounts. Certified public libraries receive the full range of support services from the State Library and personnel from certified libraries are given preference in training and continuing education programs.

### Community Library Enhancement Fund (CLEF) Grants

Only certified public libraries are eligible for this grant from Utah State Library funds. These direct grants are designed to motivate public libraries to meet or exceed library standards. They are also intended to help augment the limitations of local funding. Local governments, however, may not reduce library budgets because of the [CLEF Grant funds](#). Libraries are required to submit an annual expenditure report to the State Library explaining how the State funding has made a positive difference in library service to the local community.

### Library Excellence

For Utah libraries striving for excellence, Library Journal magazine publishes "LJ Index of Public Library Service", that identifies "star" libraries out of thousands of public libraries it rates, based on Annual Statistical Report Data. The top libraries in each population group get five, four, or three Michelin guide-like stars. Ratings are based on four per-capita service indicators: library visits, circulation, program attendance, and public Internet computer use. Visit the [Library Journal website](#).



## SECTION IV – BOARD MANAGEMENT

### Chapter 11 Roles and Golden Rules

Often it seems difficult to separate and differentiate the duties and activities of the library director and the board. The bottom line is that the board and the director are partners working together to oversee the management of the library and ensure its success. Trustees are appointed to represent the public in the governing of the library and derive their authority from the Utah Code. The library director is hired to be the day-to-day manager of a public agency. He/She supplies the expert knowledge needed to manage the organization in accordance with board guidance.

#### **Roles for Utah Boards**

*Governance:* Know local and state laws affecting libraries and ensure that library services conform to all [Utah Statutes](#). Read Utah's [Public Library Certification Standards](#), and contact your [USL Consultant](#) with questions.

*Planning:* Participate in developing an overall plan for library improvement, set short-term and long-range goals and objectives. Annually evaluate both plans and make revisions for the future, and know how to measure library success.

*Personnel:* Employ a qualified library director at a competitive salary. Support the librarian in efforts to meet State certification requirements. Be aware of local, State, and federal employment practice laws.

*Policy Making:* Participate actively in the policy making process to support the library's mission in the community. Adopt written policies to support the goals and objectives of the library, guide daily operations, and implement State statutes.

*Finances/Budget:* Understand the categories and sources of tax revenues available for library needs. Be knowledgeable of benefits to the library from Community Library Enhancement Fund (CLEF) grants, E-Rate and LSTA grants. Ensure that the library annually complies with the "Maintenance of Effort" funding level, or in other words, local operational funding must not decrease more than 10% over two preceding fiscal years.

*Public Relations:* Establish, promote, and participate in a planned program of public relations on behalf of the library. Maintain important and influential contacts in the community and keep them informed of the library's progress and critical needs.

*Continuing Education:* Provide an annual budget for library personnel and trustees to attend library workshops, conferences, and meetings. Attend UPLIFT-T training and library association sponsored meetings for public library trustees.

#### **Orientation for Board Members**

The board and library benefit when new trustees are well informed and can assume an active role early in their tenure. Orientation is key to making new board members feel comfortable and confident, and a refresher session can re-energize those who have served a long time. When a new trustee is appointed, the board chairperson and library director should meet with the trustee as soon as possible to welcome



him/her, provide essential information, and discuss any concerns the new member may have. A tour of the library is highly advantageous. Staff should be introduced, and library services and programs described.

### **Board Member Notebook**

The board chair should supply each new member with basic information about the library, board organization, and documents pertinent to board business. It should be each member's responsibility to keep their information updated. Some boards use 3-ring binder notebooks, but the State Library encourages all boards to evolve to electronic document format for ease of revision and updating materials.

#### **Sample Board Member Information:**

- Board of Directors bylaws
- The library mission statement and long-range plan
- A list of other board members, with addresses, phone, and email
- Calendar of board meetings
- Library staff organization chart
- Library annual reports, including financials
- Minutes from recent board meetings
- Copies of Library Laws of Utah and Public Library Certification Standards from the [State Library website](#).
- Information about the Utah Library Association (ULA) and their Trustees Roundtable, and the American Library Association (ALA) and their division for trustees – (See Appendix Material in this Trustee Manual.)
- Copy of the Utah Trustee Manual. View the [Trustee Manual](#) online.

## **Golden Rules for Library Board Members**

### **Now That I'm on the Board, What Should I DO?**

- Use the Library! Visit the Library and attend its programs.
- Attend Board meetings and contribute to Board business.
- Assist the Board to:
  - Monitor and review policies and plans,
  - Plan and evaluate Library goals and objectives annually, and
  - Review budget and financial issues.
- Advocate and communicate the value of library service.
- Know your community so you can represent their wishes and needs.

### **Now That I'm on the Board, What Should I NOT DO?**

- Don't talk too much, or listen too little.
- Don't publicly criticize a board decision you did not support.
- Don't criticize board decisions made before you came to the board.
- Don't leak information from a closed board session, or speak for the board. The Board Chairperson is the only official Spokesperson of the Board.
- Don't ignore advice from fellow board members.
- Don't try to have all the answers for every question.
- Don't be stubborn on an issue despite the evidence, or refuse to compromise.
- Don't be unprepared for meetings, or any agenda topic.
- Don't miss meetings.
- Don't fail to complete work assigned to you.



## Chapter 12 Buildings and ADA

Increasingly the stature of libraries will depend on their physical appearance and the public's perception of them as desirable public spaces. The appearance, functionality, safety and accessibility of the library building are the shared responsibility of the board and the library director. This responsibility involves monitoring existing facilities and, when necessary and appropriate, planning and budgeting for renovation or construction of facilities.

### Facility Evaluations

Desirable public space encompasses these key elements:

- Ease of access – streets, walkways, and parking lots lead you here
- Comfort and Image – users are drawn here; they want to be here
- Uses and Activities – there are materials and programs that people want
- Sociability – the staff has the welcome mat out

One of the best ways to evaluate your library building and its usefulness is to conduct a periodic evaluation of library facilities, with the help of a professional library building consultant, or a qualified building engineer or librarians from other communities. On a more informal scale, the board and staff can take the pulse of their building by walking through the front door and imagining this is their first visit to the library. Some libraries use the services of “secret shoppers”. The information gleaned from the building walk-around should be integrated into the library's long-range plan. Some questions to ask:

- What is your initial impression? How do your library facilities shape up?
- Are there obvious space needs? Could you add new services?
- What is the age and condition of the building's mechanical and electrical systems?
- Is this facility ready to serve 21st Century customers?

### Funding a Building Program

Municipal and county government authorities may raise taxes for the construction of library facilities or issue bonds pending approval from voters. Many agencies plan for capital expenses by putting aside a reserve fund over a number of years. Most libraries, however, find it necessary to mount a fundraising campaign to fully fund construction and acquire new materials and furnishings. The board and director must coordinate the efforts of private fundraising groups, such as, Friends and foundations, to ensure a positive, unified campaign.

Currently, there are no federal or state funds earmarked for library construction. Many Utah communities have successfully applied for Community Development Block Grants (CDBG) through their county planning associations. For more information on CDBG, contact the State of Utah, [Division of Housing and Community Development](#).



## **ADA and Building Compliance**

The Americans with Disabilities Act ([Public Law 101-336](#)) is a federal law passed in 1990 that provides that all people, including those who have disabilities, have essentially the same rights of access to public buildings and services. Title I requires equal employment opportunities for individuals with disabilities. Title II prohibits discrimination on the basis of disability in state and local government buildings and services, including public library buildings and services.

### **Building Modifications**

The law requires "reasonable" modifications to buildings. The law permits buildings to remain unchanged if the modifications would be too costly, as long as the plan indicates that the problems are to be resolved if remodeling is undertaken or a new building is built.

### **Inside the Library**

Federal specifications indicate that all public areas of the building should be accessible to someone who uses a wheelchair. However, if a staff person should become disabled, or a person with a disability is hired, all staff areas would have to be modified to make them accessible as well. The federal law indicates that certain types of permanent directional signs must be in Braille.

## **Library Services**

### **Reading and Study Area**

A certain percentage of the seating area must be accessible to people using wheelchairs so that they can sit at a table. Specific clearances must be allowed between pieces of furniture so people who use wheelchairs can move between them.

### **Checkout Areas**

At least one part of the checkout desk has to be a specific height for people who use wheelchairs. Security gates must accommodate wheelchairs.

### **Library Catalogs**

There is a maximum height for card catalogs. There must be accessible workstations for use of an online catalog. (Although not addressed in the 1990 technical guidelines, this point falls under the need to make services accessible.)

### **Magazine and Reference Areas**

There must be access to these areas for people who use wheelchairs, and there is a maximum height for shelving in these areas.

### **Book Stacks**

There is not a maximum height for the general book stacks, but the library staff must accommodate people by helping them get the materials they need. There are width specifications between the book stacks, and there must be a turn radius at the end of each one.



## Chapter 13 Continuing Education

Even the most knowledgeable and experienced library trustee needs continuing education to stay informed about new laws, new technologies, and new possibilities for library service. Library services and library policies must constantly evolve to keep pace with diverse community needs. Library leaders, including library trustees, who stay informed of these changes will be better able to provide high-quality library service to their community.

### CE at Board Meetings

Short continuing education sessions can be held during library board meetings. This is a way to reach every trustee on the board and also a way to involve the board in brainstorming or problem-solving discussions on issues that may be important to the library. Here are a few basic ideas for trustee continuing education.

- Use the chapters of this manual to conduct trustee education on a regular basis.
- Ask the library director to conduct seminars for trustees or contact the State Library for a speaker on topics such as Intellectual Freedom, Technology Planning, Collection Maintenance, Library Resources, or Internet Use Policy.
- Visit other libraries in the state and request meetings with the library director and trustees of those libraries; attend board meetings of other libraries.
- Ask an attorney to give a presentation on legal issues related to libraries and library trusteeship.
- Join the American Library Association (ALA) and the Utah Library Association (ULA). The costs for these memberships are appropriate to pay from the library's budget. See Appendix Material in this Trustee Manual.
- Attend one or more library workshops or conferences annually. One of the most rewarding aspects of statewide workshops is the opportunity to share experiences and ideas with trustees from other libraries.
- State law requires your jurisdiction to conduct annual training on the Open Meetings Act ([Section 52-4-104. Training, UCA](#))

### UPLIFT-T

The State Library Division sponsors UPLIFT-T; the Utah Public Library Institute for [Training for Trustees](#). Annually, programs developed primarily for trustees on issues of vital interest to trustees are presented in conjunction with the annual Utah Library Association conference. State Library consultants can assist local libraries in planning and presenting trustee orientation programs.

### Funding CE

When developing the annual budget, include funds for trustee memberships in associations, attendance at workshops and conferences, book purchases, and other relevant expenses. Develop guidelines for trustee and staff continuing education expenses so participants are clear about what expenses will be reimbursed and what documentation is required for accounting purposes.



## SECTION V – LIBRARY ADVOCACY

### Chapter 14 Advocacy and Public Relations

An important role for a member of a public library board is to support the institution through advocacy. A trustee is the library's best and most credible advocate for excellence in library service. Trustees are knowledgeable about library issues and, as citizens, reflect the needs and concerns of the community. As volunteers, trustees' words hold weight with community leaders and government officials.

#### Advocacy

At a time when costs and demands are rising and public agencies must compete for limited resources, it is crucial that the director, the staff, and trustees work together to foster a positive public image for the library. As a board member, you believe that your library is a vital part of the community so you can honestly champion adequate funding and recognition for the library. Some key ways to be an advocate include:

- Be well informed on local, state, and national issues and proposed legislation, initiatives and/or referenda that may affect libraries.
- Advocate, support, defend, and speak out about library issues at board meetings or hearings, as well as with citizens, government leaders, and elected officials.
- Communicate to the community on a regular basis about the library's services and long-range plans.
- Assure that the library has an effective marketing and public relations program.

#### Government Relationships

A library board of trustees can make an important investment in the library's future by cultivating close, cordial working relationships with key government officials.

- Stay current; know who the key decision makers, and influential community leaders are and how to contact them.
- Identify officials' key staff members and cultivate relationships with them.
- Add officials to the library and Friends of the Library mailing lists.
- Make personal contacts with officials by phone, personal letter, or e-mail.
- Invite officials to library functions, especially those that highlight or showcase programs and services.
- Thank local officials for their support!

#### Public Relations

Public relations is a planned program of communication between the library and the community it serves. The purpose of public relations is to raise awareness about the role of the library in people's lives. Effective PR means using a variety of media outlets and making public presentations. Many libraries lay out a year's worth of planned activities to keep their promotions on track. Even libraries with small budgets can find creative ways to publicize their accomplishments. In order to make public relations a priority activity, boards are required to include such activities in their long-range plan in accordance with library certification requirements.



## Chapter 15 Friends and Foundations

Many individuals in a community want to support their local library above and beyond paying taxes. Friends of the Library and library foundations are two well-established avenues that donors can use to channel financial contributions to the library. Friends and foundations are essential to sustaining long-term library development and their members can generate good will for the library through lobbying, advocacy and volunteerism.

### Friends of the Library

Friends organizations are groups of citizens who join together to support, improve, and promote the library. Some are formally incorporated, not-for-profit bodies; some are informal groups of library supporters. Information about establishing a Friends organization and ideas for Friends activities and projects is available from [Friends of Libraries U.S.A.](#) or the [State Library](#). A Friends of the Library group can sponsor projects important to the library. They can perform support work at the library. The Friends' role will vary according to the needs of the library as determined by the board and director.

Friends are usually organized with one of the following activities in mind:

- Raise money for special projects and expansions not covered by the operating budget.
- Sponsor programs designed to contribute to the cultural life of the community.
- Volunteer work in the library on specific projects designated by and under the supervision of the director.
- Raise public awareness of library services and promote public relations.
- Organize politically for favorable library legislation and appropriations.

Trustees can encourage and lead Friends in a variety of ways. They can develop policies on Friends, become members and attend events sponsored by Friends, appoint a liaison to the Friends and ask for their input. Trustees should recognize the accomplishments of the Friends and express appreciation.

### Foundations

The primary distinction between a Friends of the Library group and a library foundation is that a library foundation will typically have a single purpose: to raise private funds for the support of the library, often including support for library building projects. A foundation allows donors to treat their donations as tax deductible contributions. Foundations must be legally established. The paperwork to ensure compliance with IRS Code and State laws will require legal counsel. The responsibility for running a foundation is in the hands of a public board of directors.

Information on [incorporating a non-profit corporation](#) in Utah and applying for a [501-C Tax Exempt Status](#) can be obtained from the Utah Dept. of Commerce, [Division of Corporations and Commercial Code](#).



## SECTION VI – ROLE OF THE STATE LIBRARY

### Chapter 16 Role of the State Library

#### ***“Develop, Advance, and Promote Library Services and Access to Information”***

Mission statement of the Utah State Library

The Utah Code has designated the State Library Division as "the library authority for the state" and has given it the responsibility for "general library services" ([Section 9-7-201, UCA](#)), and given it authority to "develop standards for public libraries" ([Section 9-7-205\(1\)\(n\), UCA](#)). The State Library works on behalf of libraries and librarians to enhance library service Statewide. There are three major programs within the Division: Library Development, Library Resources, and The Library for the Blind and Disabled. Within the organizational structure of Utah State government, the State Library is a part of the Department of Community and Culture.

#### **Responsibilities of the Utah State Library Division**

The State Library plays a key role in facilitating discussions on statewide issues, initiating regional planning, coordinating resource sharing, and educating library directors, trustees and local elected leaders. Some of the specific programs administered by the State Library include:

- preserve and disseminate state government information;
- administer federal and state grants;
- compile statistics on public library service;
- develop standards for library certification;
- provide consulting and training services for librarians and trustees;
- provide [Pioneer Public Library](#) Internet resources;
- distribute summer reading program materials;
- supervise bookmobile service; and
- provide state and regional library services for the blind and disabled.

#### **Responsibilities of Local Libraries**

The State Library has a primary charge to document the progress of library service statewide. In order to meet this task, the State Library is authorized to conduct surveys, collect statistics and planning documents, administer grant programs, and enforce applicable library laws within its jurisdiction. The local library jurisdiction is expected to comply with State Library requests for information and to submit required reports and documents in a timely manner. Some of the regularly scheduled reports that need to be sent to the State Library include: the annual statistical report; grant expenditure reports and evaluations; long-range plans and technology plans; Internet policy updates; orders for summer reading materials; and changes in library hours, directorship and board appointments.

The State Library could not fulfill its mission without the cooperation of every local library director and board. THANK YOU FOR YOUR SERVICE!



# APPENDIX MATERIAL



While the American Library Association endorses the following, your board, city or county attorney, and elected officials are ultimately responsible for setting these policies. Therefore, this policy statement is offered for information purposes only. Utah State Library does not endorse any specific language concerning local library policies.

## **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.

- I. Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
- II. Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
- III. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
- IV. Libraries should cooperate with all persons and groups concerned with resisting abridgment of free expression and free access to ideas.
- V. A person's right to use a library should not be denied or abridged because of origin, age, background, or views.
- VI. Libraries which 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.

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Adopted June 18, 1948, by the ALA Council; amended February 2, 1961; January 23, 1980; inclusion of "age" reaffirmed January 23, 1996.



## COMMUNITY LIBRARY ENHANCEMENT FUND (CLEF)

**Eligible Libraries.** All Utah public libraries that fulfill the requirements for State Library Certification are eligible for an annual Community Library Enhancement Fund Grant. Library Certification requires Utah public libraries to meet service standards in the areas of governance, funding, housing and access, personnel, materials, services, reporting and evaluation.

**Grants awards schedule.** Community Library Enhancement Fund Grants are calculated for all qualified and certified public libraries following the State Legislature session and are awarded at the beginning of the next calendar year. Specific amounts are based on a formula applied to the number of libraries that achieved certification in the applicable year.

**Background.** The Utah State Library Division awarded the first Public Library Development Grants in 1987. The direct grants were designed to motivate public libraries to meet the service standards required by the *Upgrade Process*. They also were intended to help augment the operational needs and limitations of local funding to public libraries. Over the years, the size of the grants grew significantly allowing public libraries to improve their services, resources, and programs, and the name was changed to Community Library Enhancement Fund.

Another important purpose of the CLEF grants was to encourage directors and trustees on behalf of their libraries to engage in more formal planning activities to prepare for future service needs. Libraries participate in surveying community information needs on a regular basis, set goals to meet those needs, develop and implement plans to achieve those goals, and annually assess the success or failure of their plans. As a result of improved planning activities, public libraries now have formally written mission statements, collection development and Internet policies, and prepare long-range goals and objectives and evaluations of previous year's plans.



**Allowed Uses.** CLEF Grants may be used for any library purpose that improves library services to the community. The Grants may not be used as match in other grant applications, and may not replace local funding. Funds must be expended by June 30th of the grant year.

**Local Government Support (Maintenance of Effort).** Local governments must provide funding for public libraries. To be eligible for the CLEF grants, local operational funding must not have decreased more than 10% over the course of the two preceding years.

**Reporting.** Recipients are required to provide a report of expenditures under this grant. This report should include details about how the funding has made a positive difference in library service to the local community.

For more information contact: the USL Grants Coordinator (801-715-6732).

## Library Board Terms

### A Summary of the Pertinent Utah State Statutes

Following is a synopsis of the sections of the Utah Code that pertain to library boards, as understood by the State Library Division's interpretation thereof. In the following statements "governing entity" refers to the city council or mayor and to the county commission or council. This synopsis is not intended to replace the Utah Code, and questions that the Board may have concerning interpretation of the Code should be directed to its legal counsel.

1. All changes to a library board, in members or chairperson, should be reported to the State Library Division through the library's assigned State Consultant as soon as possible after the change becomes effective. This enables the staff to keep a board listing current and ensure that board members receive the correct mailings.
2. The establishment and continuance of both city and county library boards are based on the same guidelines and restrictions, except for the length of terms. City board members serve three-year terms; county board members serve four-year terms.
3. Board members must be appointed by the governing entity from citizens of the governing jurisdiction. Library boards can recommend members to the governing entity, but cannot appoint their own members.
4. Legally established boards must have from five to nine members. Only one member (or representative) of the governing entity may serve on the board at any one time. If the representative of the governing entity is deemed by the governing entity to be a non-voting liaison, that person should be reported to the State Library Division as a non-voting member, and will not be included in the five to nine member number.



5. When a board is established, the terms of the citizen members should be staggered by the governing entity so that as nearly as possible equal number of terms expire each year (i.e. 1/3rd or 1/4th).
6. Each citizen member of the board is entitled to serve two full terms at the pleasure of the governing entity. When their first term is finished, they must be formally reappointed by the governing entity.
7. When a board member resigns in mid-term, the governing entity may appoint a replacement to serve out the remainder of that term. As this is a partial term, that person will then be eligible for another two full terms, if reappointed by the governing entity.
8. When a position becomes vacant because a term has expired, the person appointed to fill that position will be deemed to be serving a full term from the time of expiration, even if the position goes unfilled for a period of time.
9. Any citizen member who has served two full terms must remain off the board for one full year before they may be reappointed.
10. If it is decided to reduce the number of people on the board, the governing entity should officially make that declaration, and a letter should be sent to the State Library Division to that effect. Reduction of the board below five people constitutes a board that is not in compliance with the law. Conversely, a board with more than nine voting members is also not in compliance.
11. If the number of members on a board is officially increased or reduced, the board should review the term expirations of its members and determine if the terms are still set up in a staggered fashion (approximately the same number of people go off the board each year). If not, they should propose a solution to the governing entity, which would rule on the proposal. Then a copy of the new terms should be sent to the State Library Division.



12. Terms that may be shortened by realignment to meet the "staggered" provision of the law are deemed to be full terms.

13. The statutes state that the appointment of new board members (or reappointment of board members whose first term has expired) by the governing entity should occur before July 1 of each year. The State Library Division interprets this to mean that terms should begin on July 1 and expire on June 30, corresponding to the State and city fiscal year.



## **ALA's Association for Library Trustees and Advocates**

### **How ALTA Can Help You**

ALTA is the only organization that has developed a national network of library trustees. This network plus the extensive resources of ALTA can empower you to advocate for and adopt policies that promote the highest quality library and information services.

### **Who Are ALTA Members?**

Like you, ALTA members are enthusiastic library supporters who as trustees or advocates speak with a united voice in championing their library and their dedicated library staff. They are people who know libraries are a vital part of their communities and our nation, and believe that excellent library service is the cornerstone of a better-educated, information-literate society.

### **You Have Questions, ALTA Has Answers...**

- Your library is facing a budget cut, what can you do?
- A parent is demanding that a certain book be removed from the library, how should you respond?
- You need to hire a new library director, what qualifications should you be looking for?
- Your library building is inadequate, can or should you renovate the current building?

### **ALTA Membership Benefits**

- *American Libraries* magazine
- *the Voice*, the official ALTA Newsletter
- Educational events at the ALA Annual Conference, various National Institutes, and beginning in 2004 via the Internet



- Access to highly trained ALTA and ALA staff
- ALTA publications and fact sheets
- Networking opportunities
- National Library Legislative Day
- ALA/ALTA product discounts
- ALTA Awards
- A Voice in the National Advocacy Honor Roll
- Library Advocacy Now! Training

**\*To have membership information sent to you, please visit <http://www.ala.org/ala/mgrps/divs/alta/alta.cfm>, or call the ALTA office at 1-800-545-2433, ext. 2161.**

**As of February 1, 2009, the Friends of Libraries U.S.A. (FOLUSA) and the Association for Library Trustees and Advocates (ALTA) join forces to become an expanded division of American Library Association. The new organization will be called the Association of Library Trustees, Advocates, Friends and Foundations (ALTAFF).**

**Read more at: <http://www.folusa.org/altaff.php> or visit the new ALTAFF organization online at [www.ala.org/altaff](http://www.ala.org/altaff).**



# Utah Library Association

## Welcome to the Utah Library Association

Welcome to the [Utah Library Association Home Page](#). The purpose of this page is to provide Utah librarians and others interested in Utah libraries and librarians with information about the activities of the Association. One of the great advantages of membership in a professional association is the opportunity to network. Electronic communications enhance and enlarge that opportunity. We hope that these pages will provide you with the information that you need. When you find something you want to do, volunteer! ULA invites anyone interested in libraries in Utah to join ULA and to enjoy the benefits of membership as we work toward our common goals. This site will continue to grow and change.

The mission of the Utah Library Association is to serve the professional development and educational needs of its members and to provide leadership and direction in developing and improving library and information services in the state. In order to accomplish these goals, ULA supports and provides continuing education programs for Utah librarians and library employees, especially at its annual spring conference. The Association also initiates and supports legislation promoting library development and monitors legislation that might threaten Utah libraries and librarians. ULA also offers members a number of opportunities for library leadership, professional growth, networking, and community service. We hope that you will find the Utah Library Association to be an organization that makes a difference for you, for Utah librarians, for Utah Libraries, and for the citizens of Utah.

The [Bylaws](#) and Manual of Procedures provides detailed information on every aspect of the Association and should answer nearly any question that you might have about ULA policies and procedures. A brief [history of ULA](#) is found on this site. Find out more about ULA benefits on the [Member Services](#) page!





# Utah Library Association

Utah Library Association  
P.O. Box 708155  
Sandy, Utah 84070-8155

## ULA PERSONAL MEMBERSHIP

*Membership year: January 1 through December 31*

Name \_\_\_\_\_ Job Title \_\_\_\_\_

Library or Branch Name \_\_\_\_\_

Institution or Business Name \_\_\_\_\_

Work Telephone \_\_\_\_\_ Extension \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Preferred Mailing Address:

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Membership Dues

*Please place a checkmark to identify your membership category*

\_\_\_\_\_ **Category I \$ 20 Associate Member**

First-time member, Student, Half-time library employee,  
UELMA member, Retiree, Trustee, General Public.

\_\_\_\_\_ **Category II \$ 40 Member**

Persons employed in a library or library related setting  
more than 20 hours per week.

\_\_\_\_\_ **Category III \$ 1,000 Lifetime Member**

One-time payment.

*Please indicate your main professional affiliation(s). All sections and roundtables are free of charge.*

### Sections

Academic Library  Public Library  School Library  Special Library

### Roundtables

ACRL - Association of College & Research Libraries  LAMART - Library Administration & Management

AMSC - Archives, Manuscripts, & Special Collections  LIRT - Library Instruction

BURT - Business Roundtable  LPSS - Library Paraprofessional & Support Staff

CSRT - Children Services  NPRT - New Perspectives

START - Service and Technology Access  RAS - Reference & Adult Services

GENRT - Genealogy Roundtable  TSRT - Technical Services

GODORT - Government Documents  TFRT - Trustees and Friends

HEART - Health Roundtable  YART - Young Adult Services

Can you serve on a ULA Committee or as an officer of the ULA?  Yes  No

The ULA has permission to include my name in mailing lists sold to outside groups.  Yes  No

Membership Dues \$ \_\_\_\_\_ *Attach credit card authorization form*

*or make check payable to:*

Donations:

Intellectual Freedom Fund \$ \_\_\_\_\_ **Utah Library Association**

Unrestricted General Fund \$ \_\_\_\_\_ **2150 South 1300 East, Suite 500**

**Salt Lake City UT 84106**

Total Amount Enclosed \$ \_\_\_\_\_

*Office Use Only*

Date Received: \_\_\_\_\_

Initials: \_\_\_\_\_



## **SAMPLE BYLAWS** (Illinois Trustee Facts File, 3rd Edition, p.9)

### **BYLAWS OF THE XYZ PUBLIC LIBRARY**

These rules are supplementary to the provisions of the statutes of the State of \_\_\_\_\_ as they relate to the procedures of Boards of Library Trustees.

#### Regular Meetings.

The regular meeting of the Board of Library Trustees of the XYZ Public Library shall be on the \_\_\_\_\_ (*insert text such as first Monday*) of each month. The meeting shall be at the library at \_\_\_\_\_ o'clock. The meetings shall be open to the public and noticed in advance. At the beginning of each fiscal year, the board shall, by ordinance, specify regular meeting dates and times. The secretary of the board shall then (1) provide for the local newspaper the schedule of regular meetings of the board for the ensuing fiscal year, and (2) post the schedule of meetings in the library. Both notices shall have the dates, times, and places of such meetings.

#### Special Meetings.

Special meetings shall be held at any time when called by the president or secretary or by any three trustees of the board, provided that notice with the agenda of the special meeting is given at least 48 hours in advance, except in the case of a bona fide emergency, to board members and to any new medium which has filed an annual request for notice under the Open Meetings Act; no business except that stated in the notice and agenda shall be transacted. Notice and agenda shall be posted 48 hours in advance on the front door of the library except in the case of a bona fide emergency.

#### Annual Meeting.

An annual meeting shall be held in \_\_\_\_\_ (*insert month*) for the purpose of hearing the annual reports of the librarian and committees. The report should include a summary of the year's work with detailed account of the receipts and expenditures, a budget for the following year, and other information according to statute. A copy of this report shall be forwarded to the Illinois State Library in accordance with the law. A copy should also be on file in the library.

#### Quorum.

A quorum at any meeting shall consist of \_\_\_\_\_ (*insert number*) Board members.

#### Board of Library Trustees.

The Board of Library Trustees of the XYZ Public Library is charged with the responsibility of the governance of the library. The Board will hire a skilled Library Director who will be responsible for the day-to-day operations of the library. The Board will meet at least once per month. These meetings will be open to the public, and noticed in advance.

The agenda and/or information packet for the meetings will be distributed to the Board by the Library Director one week prior to meetings. Any Board member wishing to have an item placed on the agenda will call the Library Director in sufficient time preceding the meeting to have the item placed. Any Board member who is unable to attend a meeting will call the library to indicate that he or she will be absent. Due to the fact that a quorum is required for each meeting, this phone call should be placed as far in advance as possible.



## BYLAWS OF THE XYZ PUBLIC LIBRARY (CONTINUED)

### Board of Library Trustees (continued).

Board members are not to be compensated pursuant to statute, but will be reimbursed for necessary and related expenses as trustees. To be effective, Board members must attend most meetings, read materials presented for review, and attend an occasional Library System (or other library related) workshop, seminar, or meeting. The Library Director will make the dates of these workshops known to the Board in a timely manner. It is the goal of the Board of Library Trustees to have each member attend a minimum of one Library System (or other library related) workshop, seminar, or meeting during each calendar year. Board members using their own vehicle will be reimbursed at the rate allowed by the IRS for travel to and from any Library System (or other library related) workshop, seminar, or meeting. Board members are not exempt from late fees, fines, or other user fees.

### Officers and Elections.

The officers of the Board shall be a president, a vice-president, a secretary, and a treasurer. Those officers shall be elected by a ballot vote for \_\_\_\_\_ (*insert number*) year terms at the regular meeting in the month of \_\_\_\_\_. The president shall not serve more than two consecutive terms unless by unanimous board consent. In the event of a resignation from an office, an election to fill the unexpired term of that office will be conducted by a ballot vote at the next regular meeting.

### President.

The president shall preside at all board meetings, appoint all standing and special committees, serve as ex-officio member of all committees, and perform all other such duties as may be assigned by the board. The president shall be the only spokesperson for the Board of Library Trustees in all advisory or disciplinary action directed to the staff.

### Vice President.

The vice-president, in the absence of the president, shall assume all duties of the president.

### Secretary.

The secretary shall keep minutes of all board meetings, record attendance, record a roll call on all votes (except when a ballot vote is taken). The secretary shall perform all other such clerical duties as may be assigned by the board.

### Treasurer.

The treasurer is authorized by the Board to sign checks, shall serve on the finance committee, and shall draw up checks. The treasurer shall keep all financial records of the Board. The normal depository of all financial records shall be the library. The treasurer shall have charge of the library funds and income, sign all the checks on the authorization of the board, and report at each meeting the state of the funds. In the absence of the treasurer or when he or she is unable to serve, the president or vice-president may perform the duties of the treasurer. The treasurer shall be bonded in the amount to be approved by the board and according to statute requirement. The treasurer is authorized to pay salaries and insurance bills as they come due.



## **BYLAWS OF THE XYZ PUBLIC LIBRARY (CONTINUED)**

### **Standing and Special Committees.**

The standing committees shall be appointed annually in the month of \_\_\_\_\_ and shall consist of three members including the Library Director. The standing committees at their first meeting shall elect a chairperson. Special committees may be appointed by the president to present reports or recommendations to the Board and shall serve until the completion of the work for which they were appointed. The standing committees shall be the finance committee, the personnel committee, the policy committee, and the building and grounds committee. The library shall be the depository of all committee reports.

### **Finance Committee.**

The Finance Committee shall be comprised of two members of the Library Board of Library Trustees including the Treasurer and the Library Director. The Finance Committee's responsibilities include, but are not limited to, drafting a preliminary Budget or Budget and Appropriations Ordinance for full board approval, drafting a Levy for full board approval, drafting a working budget for full board approval, monitoring library investments, and implementing the library's investment policy.

### **Personnel Committee.**

The Personnel Committee shall be comprised of two members of the Library Board of Library Trustees including the President and the Library Director. The Personnel Committee's responsibilities include, but are not limited to, preparation of the annual review of the Library Director for discussion among the full board prior to the formal review, assisting the Library Director in the preparation of his or her annual statement of goals and objectives for the coming year, and assuming a leadership role in the resolution of any personnel conflict which cannot be resolved by the Library Director. The Library Director is responsible for the annual review of all other library employees.

### **Policy Committee.**

The Policy Committee shall be comprised of two members of the Library Board of Library Trustees and the Library Director. The primary responsibility of the Policy Committee is to develop the Library Policy.

The committee shall determine the library regulations governing the use of the Library and review sections of existing policy in a systematic fashion to insure that all policy is reviewed at an interval not to exceed three years. As a result of such policy reviews, the Policy Committee will make recommendations regarding additions or changes to existing policy as well as deleting policies which are no longer appropriate or of value. The entire library Policy must be approved by Board vote and made readily available to the public.

## **BYLAWS OF THE XYZ PUBLIC LIBRARY (CONTINUED)**

### **Building and Grounds Committee.**

The Building and Grounds Committee shall be comprised of two members of the Library Board of Library Trustees and the Library Director. The Building and Grounds Committee's responsibilities include, but are not limited to, conducting an annual inspection of the library's physical facility to identify areas which are in need of repair, and making recommendations to the full board regarding any and all repairs which are deemed necessary either as a result of the annual inspection or throughout the year as the need arises.

### **Librarian Search Committee.**

When the position of librarian falls vacant, the Board shall immediately select an acting librarian for the interim and establish a Librarian Search Committee, which shall consist of the President and two members elected from the Board. Applications for the position of librarian shall be filed at the library and available to all Board members. The Search Committee shall report the results of applications and interviews to the Board. Five votes shall be required for the Board to hire a Librarian, after which the Search Committee is dissolved.

### **Order of Business.**

The following Order of Business shall be followed at regular meetings:

- Call to order
- Roll call, recording both present and absent members
- President's report
- Secretary's report, approval of minutes as received or corrected
- Correspondence, communications, and public comments
- Financial report, approval of bills payable
- Librarian's report
- Committee reports, in order of their appearance in the Bylaws
- Unfinished business
- New business
- Other
- Adjournment

### **Parliamentary Procedure.**

Robert's Rules of Order, Revised shall govern the parliamentary procedure of the Board, unless otherwise specified in the Bylaws.

### **Amendments.**

Amendments to these Bylaws, the Library Policy, or any other policy or procedural document may be proposed at any regular meeting of the Board and will become effective if and as adopted by a majority of those members present providing they represent a quorum.





## PUBLIC LIBRARY SERVICE RESPONSES FOR STRATEGIC PLANNING

The Public Library Association's planning model, *Planning for Results* has combined elements of two earlier library planning models, *Planning and Role Setting for Public Libraries* and *TELL IT!*, with a focused emphasis on translating planning decisions into resource allocation. In the PLA model, "Service Responses" are used to generate roles for the library in its overall mission statement. They are specific responses to meet a set of well defined community needs and to get specific results. They are presented here to introduce you to the PLA model and, hopefully, encourage you to learn more. In *Planning for Results: A Public Library Transformation Process*, available through the Utah State Library, each service response described below is accompanied by a description of target audiences, possible components, allocation issues, possible measures, and actual case stories. Remember; this list is not intended to be a recommendation of what any public library should be, but rather a common list of proven roles from which a public library may choose what role(s) it wants to fill.

**1) Be an Informed Citizen - Local, National, and World Affairs:** Residents will have the information they need to support and promote democracy, to fulfill their civic responsibilities at the local, state and nation levels, and to fully participate in community decision-making.

**2) Build Successful Enterprises - Business, Non-Profit and Career Support:** This response addresses a need for information related to business, careers, work, entrepreneurship, personal finance, and employment. The library provides expert personal assistance, specialized electronic and print resources, and services of interest to the business community, investors, and those seeking employment or changing careers. A significant amount of library information can be accessed by users remotely.

**3) Celebrate Diversity - Cultural Awareness:** This response helps satisfy the desire of community residents to gain an understanding of their own cultural heritage and those of others. An in-depth collection of material and resources in many formats, programs, and displays that reflect cultural heritages are provided. The staff may be multi-lingual.



**4) Connect to the Online World - Public Internet Access:** Residents will have high-speed access to the digital world with as much freedom to access as possible to ensure that everyone can take advantage of the ever-growing resources and services available through the Internet.

**5) Create Young Readers - Emergent Literacy:** Pre-school children will have programs and services designed to ensure that they will enter school ready to learn to read, write and listen.

**6) Discover Your Roots - Local History and Genealogy:** This service addresses the desire of residents to know and understand personal or community heritage. The library provides a significant collection of genealogical materials and access to web resources, also regional histories and related archival documents. The staff have specialized skills for such research.

**7) Express Creativity - Create and Share Content:** Residents will have the services and support they need to express themselves by creating original print, video, audio, or visual content in a real-world or online environment.

**8) Get Facts Fast - Ready Reference:** The library helps meet the need for answers to questions on a broad array of topics related to school, work, and personal life. Print, non-print, and electronic resources cover a wide range of topics and librarians are effective in reference skills and resources. The library provides help and resources in a variety of formats to help users get information about and from government agencies and elected officials. Internet access is essential.

**9) Know Your Community - Community Resources and Services:** This addresses the need for information related to services provided by community agencies and organizations. The library establishes ongoing relationships with those organizations and agencies and data bases on their services. The library provides convenient and confidential means of accessing the information.

**10) Learn to Read and Write - Adult, Teen, and Family Literacy:** This service response addresses the need to read and perform other essential daily tasks. The library provides an environment, specialized materials, and trained tutors to help people reach personal literacy goals, and fulfill their responsibilities as parents, citizens and workers.

**11) Make Career Choices - Job and Career Development:** Adults and teens will have the skills and resources they need to identify career opportunities that suit their individual strengths and interests.



**12) Make Informed Decisions - Health, Wealth, and Other Life Choices:** This service response addresses the need for information to make informed consumer decisions and helps residents become more self-sufficient. The library provides specialized relevant print and electronic resources, including pamphlets and brochures, and programs on consumer related topics that they need to identify and analyze risks, benefits, and alternatives before making decisions that affect their lives.

**13) Satisfy Curiosity - Lifelong Learning:** This response addresses the desire for self-directed personal growth and development opportunities for all ages. The library provides an extensive collection in varied formats on a wide range of topics of interest to users, creates pathfinders and other topic aids.

**14) Stimulate Imagination - Reading, Viewing, and Listening for Pleasure:** This response helps satisfy residents' appetite for information about popular cultural and social trends and their desire for recreational reading. The library provides a current collection with sufficient copies of high demand titles. Items are also easy to find and popular demand guides collection development. Programming includes book talks, and assistance in choosing materials that meet their interests.

**15) Succeed In School - Homework Help:** The library helps students who are enrolled in a formal program of education or those who are home schooled. Information resources, personal assistance, and educational tools such as computers are provided. Library facilities are conducive to studying and activities, and materials support curricular objectives. There is Internet access for distance learning.

**16) Understand How to Find, Evaluate, and Use Information - Information Fluency:** This service response addresses the need for skills related to finding, evaluating, and using information effectively. The library provides training in skills related to finding, evaluating and using all types of information resources. Information is provided in a variety of formats and the staff is knowledgeable about how people seek information and learn.

**17) Visit a Comfortable Place - Physical and Virtual Spaces:** This "Commons" response addresses the need of people to meet and interact with others in the community, and to participate in public discourse about community issues, or simply sit quietly and read. The library provides public space for meeting, and the electronic means of assembling, such as videoconferencing facilities.

**18) Welcome to the United States - Services for New Immigrants:** New immigrants will have information on citizenship, English Language Learning (ELL), employment, public schooling, health and safety, available social services, and other topics necessary to successfully participate in American life.



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