

Welcome

Thank you for your time and dedication as a library board trustee!

Public libraries rely on dedicated individuals like you who are ready to contribute their time, skills, and talents. As a community member, you already know how the library benefits people. As a library advocate, you help others see how crucial the library is to your community. As a trustee, you can guide your library in its mission as a place for learning, enrichment, and community connection.

Your commitment, along with that of your fellow trustees, will help your library meet its goals and thrive as a trusted community resource. When trustees work effectively together, libraries succeed, and communities ultimately benefit.

This manual outlines the responsibilities of a library board trustee, providing a range of resources to help you in your role. It's broken into sections covering key topics you may encounter, and we encourage you to review it at a pace that works for you. Your understanding of your role and how your public library operates will help enhance its effectiveness, boost its visibility, and support its future as an essential community partner and trusted resource for community members.

This LibGuide is an introduction to serving as a library board trustee and is one of many resources you can use. It's prepared as an educational resource and should not be used as a substitute for legal or financial advice. If you have questions about these topics, consult your library's legal counsel or financial advisor.

While the Bureau of Library Development (BLD) advises libraries on many topics, it is not a provider of legal advice, an advocacy organization, or a law enforcement agency. Public libraries are independent organizations and the BLD does not govern local library policies and activities or municipal decisions regarding libraries. The BLD's ability to hold libraries accountable to library laws is only related to the eligibility and standards required of libraries that receive state aid or other state and federal funds administered by the office.

Project Attribution

This project is made possible by Library Services and Technology Act (LSTA) funds from the U.S. Institute of Museum and Library Services (IMLS) administered by the Pennsylvania Department of Education, Office of Commonwealth Libraries.



The [Institute of Museum and Library Services \(IMLS\)](#) is the primary source of federal support for the nation's approximately [124,000 libraries](#), [35,000 museums](#), and related organizations. Through grants, policies, and research, IMLS empowers libraries and museums to offer important services that benefit individuals and communities.

More information about the IMLS's mission, vision, and strategic goals can be found on their [website](#).

Table of Contents

1. [Trustee Manual Overview](#)

- Welcome
- Project Attribution
- Use of Manual
- Steering Team Members and Reviewers
- Resources Used for Manual
- Printable Manual by Section

2. [For New Board Trustees](#)

- Welcome
- Board Orientation

3. [Public Library Services in Pennsylvania](#)

- What is a Public Library?
- What is State Aid?
- Types of Libraries

4. [The Office of Commonwealth Libraries and Library Laws](#)

- Office of Commonwealth Libraries
- Bureau of Library Development
- Bureau of State Library
- The Governor's Advisory Council
- Statutes, Regulations, Guidelines, and Other Information
 - Statutes, Regulations, and Guidelines
 - Other Helpful Statutes and Information

5. [Learning About Your Library](#)

- Board Orientation
- Who to Meet, Where to Visit, and Learning About Your Community

6. [Governing the Library](#)

- Board Governance
- Three Essential Duties
- Foundational and Helpful Documents
- Board Organization and Officer Roles
- Board Meetings
- Board Committees

7. [Board Trustee Responsibilities](#)

- Your Library Director
- Your Library Director: Succession Planning and Hiring
- Strategic Planning
- Policy Development
- Budgeting and Fiscal Oversight
- Revenue Development
- Media and Communications
- Advocacy
- Board Development

8. [The Library's Stakeholders](#)

- Library Staff and Foundations
- Friends of the Library
- External Stakeholders
- Community Engagement

9. [Other Helpful Resources](#)

10. [Appendix](#)

- Acronyms
- Terminology
- Sample Documents

Use of Manual

Because of the amount of information in this manual, we suggest you review it at your own pace, or jump to sections most helpful to your current question or area of interest. You can use this manual:

- As a reference for questions you have
- As a starting point for discussions with other board members
- As a way to explore additional resources on board governance topics

Steering Team Members and Reviewers

This manual was thoughtfully developed with invaluable expertise and generous support of library leaders across the Commonwealth!

Many thanks to the following:

Members of the Steering Team:

- **Anny Laepple**, System and District Administrator, [Delaware County Libraries](#)
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- **Denise Sticha**, Executive Director, [Center County Library and Historical Museum](#)
- **Elizabeth Baldwin**, District Consultant, [South Central Library District](#)
- **Joseph Sherwood**, Executive Director, [Chester County Library System](#)
- **Leslie Labarte**, District Consultant, [Warren County Library Association](#)
- **Melinda Tanner**, District Consultant, [Westmoreland County Federated Library System](#)
- **Melissa Rowse**, Library Director, [Degenstein Community Library](#)
- **Richard Miller**, Executive Director & System Administrator, [Osterhout Free Library](#) & [Luzerne County Library System](#)
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- **Chad Gump**, District Consultant, [Citizens Library and District Center](#)

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- **Ryan McCrory**, Executive Director, [Dauphin County Library System](#)

Welcome

Welcome, and congratulations on your new role as a board trustee!

We're thrilled to have you on board and appreciate your willingness to support and serve your library and community in this crucial role.

Public libraries rely on dedicated individuals like you who are ready to contribute their time, skills, and talents. As a community member, you already know how the library benefits people. As a library advocate, you help others see how crucial the library is to our community. As a trustee, you can guide your library in its mission as a place for learning, enrichment, and community connection.

Your commitment, along with that of your fellow trustees, will help your library meet its goals and thrive as a trusted community resource. When trustees work effectively together, libraries succeed, and communities ultimately benefit.

To help you start strong in your role, we've provided a range of resources in this LibGuide. If you've served on a nonprofit board before, some information may be familiar. However, there are specific topics related to public libraries that may be new and valuable for you. Your understanding of how your public library operates will help enhance its effectiveness, boost its visibility, and support its future as an essential community partner and a trusted resource for community members.

This manual outlines the responsibilities of a library board trustee. It's broken into sections covering key topics you may encounter, and we encourage you to review it at a pace that works for you. This LibGuide is an introduction to serving as a library board trustee and is one of many resources you can use. This guide is prepared as an educational resource and should not be used as a substitute for legal or financial advice. If you have questions about these topics, consult your library's legal counsel or financial advisor.

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Board Orientation

As a new board trustee, one of the most valuable experiences you can have is an orientation to your new role. Understanding the library and how it's run before you start is key to your success. Even if you've served as a trustee for another organization, libraries as public institutions are often unique in how they operate.

Orientation is typically led by the library director, an orientation team, or offered by your library district or library system, and can cover important topics, including:

- Access to an orientation packet with helpful materials (see the [Helpful Documentation to Review - Learning About Your Library](#) section for suggestions).
- The history of the library, including its mission, vision, and values.
- The library's governance structure, and your responsibilities as a trustee.
- The roles and responsibilities of a library trustee, and how they differ from the roles and responsibilities of a library director.
- What type of local library it is, if it's part of a federated system, and information about its district library center.
- A full walk-through of the library, including staff-only areas.
- Historical knowledge about how the library is set up, its sources of funding, and how the community uses and supports the library.
- Information about the community the library serves.
- The library's budget, other important financial details, and current reports.
- The library's current strategic plan and an update on its progress.
- Any recent opportunities or challenges the library is facing.
- The programs and services the library offers, and highlights over the last year.
- The library's website, and where to find important information as a trustee.
- Key stakeholders and partnerships with other organizations.
- How much time is expected from you as a trustee.

- The different committees and their work.
- The expectation that trustees make meaningful financial contributions through donations.
- The importance of fundraising for the library.
- Opportunities to meet and connect with other trustees.
- Ongoing learning opportunities to help you get comfortable in your role.

These items should be guided, facilitated, or explained by those leading the orientation. Support may be needed from the library director or staff.

More information on board orientation is in the [Learning About Your Library](#) section of the LibGuide, and a sample orientation checklist is available in the [Appendix](#).

Resources:

- BoardSource. *Nonprofit Board Member Orientation*. Retrieved 2024, from <https://boardsource.org/resources/board-orientation/> (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
- Garry, J. *A Template For A Great Board Orientation*. Joan Garry Consulting. Retrieved 2024, from <https://joangarry.com/board-orientation-template/>
- Nichols, J., & Smith Aldrich, R. (2023). *Orientation of New Trustees*. Handbook for Library Trustees of New York State. Retrieved 2024, from <https://nyslibrary.libguides.com/Handbook-Library-Trustees/orientation>

Introduction to Public Library Services in Pennsylvania

This section provides an overview of public libraries in Pennsylvania, highlighting their role in serving communities with free access to materials, trained staff, and inclusive services. You'll also find key facts, structural variations, and resources to help you understand the library types across the Commonwealth.

Talk with your library director about the type of library you govern and how that will impact your work, as this can be a complex, layered, and unique situation for every library.

What is a Public Library?

The [Pennsylvania Public Library Code](#) (also referred to as the Library Code, enacted in 2012) is a set of statutes that regulate and impact all state-aid supported libraries in the Commonwealth. It defines a local library as:

"Any free, public, nonsectarian library, whether established and maintained by a municipality or by a private association, corporation or group which serves the informational, educational and recreational needs of all residents of the area for which its governing body is responsible, by providing free access to:

- 1. An organized and currently useful collection of printed items and other materials, including free lending and reference services.**
- 2. The services of a staff trained to recognize and provide for these needs."**

Public libraries in Pennsylvania provide free resources, programs, and services to their communities and trained staff available to help. They're not only places to get information but are also safe and welcoming spaces where people can come together and connect.

Some facts about public libraries in Pennsylvania (2023 data):

- Total number of public libraries: 458, with 178 branches and 19 bookmobiles
- Total number of library card holders: 4,092,621
- Total materials circulated: 57,064,698
- Total internet computer uses: 2,245,696
- Total number of library visits during the year: 25,720,445
- Total number of programs offered: 206,943
- Total attendance at programs: 3,744,972
- Total number of cataloged items across the state: 28,520,960

Public libraries in Pennsylvania aim to be the places for lifelong learning, personal growth, and community connection. However, they can vary in how they are set up and managed - see the section on ***Types of Libraries*** for more information.

What is State Aid?

For details about State Aid (also known as the Public Library Subsidy), check out this helpful [LibGuide - State Aid Resources for Pennsylvania Public Libraries](#). It includes important information such as:

- Projections for State Aid funding
- Details on how and when payments are distributed
- Library statistics data

The LibGuide also covers the different types of State Aid, legal requirements for library hours, information for new library directors about State Aid, and a section where you can submit questions to the State Aid team.

Types of Libraries

Local libraries can be more than one type. For example, a central library with a consolidated structure can have several branches and serve as a district library center. A federated member library can serve as a district library center and be a member of a library federation. Also, a federated administrative unit can include federated member libraries that are both local and county libraries, with some of these libraries also serving the community as branches within this library system. **Talk with your library director about the type of library you govern and how that will impact your work, as this can be a complex, layered, and unique situation for every library.**

See the **Types of Libraries** section, or the definitions in the LibGuide's [Appendix - Terminology](#) section.

If you're unsure about the type of library you govern as a trustee, please check with your library director and board president.

Resources:

What is a Public Library? Section

- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93 Public Library Code, § 9302. Definitions - Local Library*. Retrieved 2024, from <https://www.legis.state.pa.us/WU01/LI/LI/CT/HTM/24/24.HTM>
- Bureau of Library Development, Office of Commonwealth Libraries. *Pennsylvania Public Library Data Collection*. LibPAS. Retrieved 2024, from <https://pa.countingopinions.com/index.php>
- Bureau of Library Development, Office of Commonwealth Libraries (2025). *State Aid Resources for Pennsylvania Public Libraries*. LibGuides at the State Library of Pennsylvania. Retrieved 2024, from <https://pa-gov.libguides.com/stateaidresource>

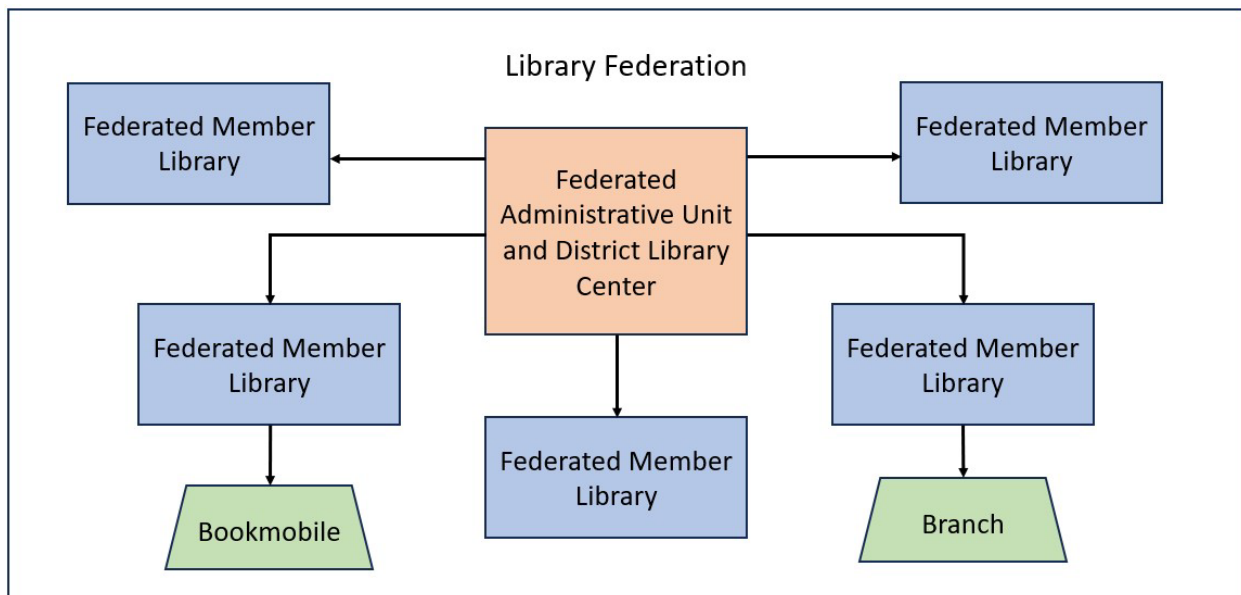
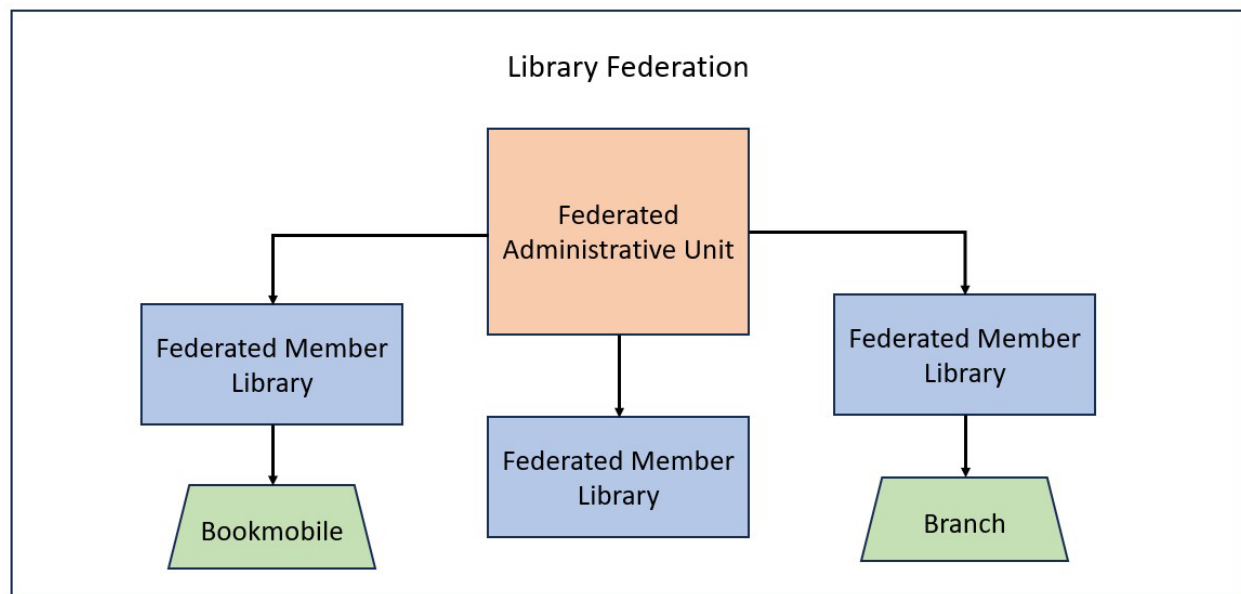
Library Federation

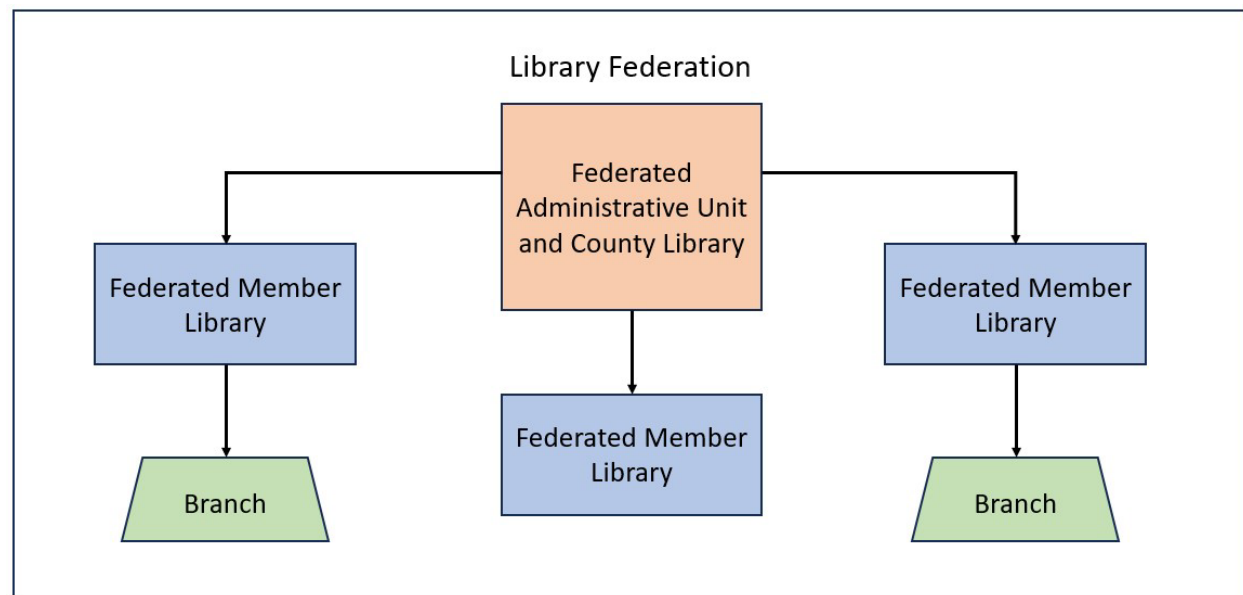
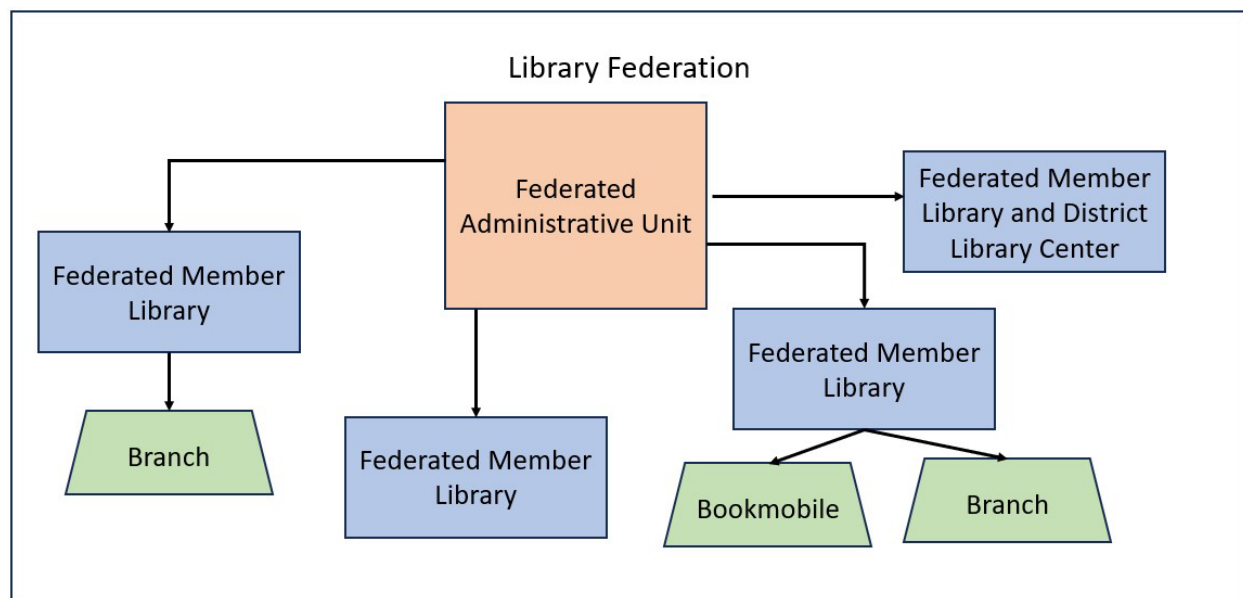
A **Library Federation** or **Library System** is at least two local libraries in a county or several counties working together. To be part of the federation, member libraries must voluntarily agree to be included, together serve a population of at least 25,000 people, and delegate to a system of board of directors the control to create policies. By working together, these libraries can offer better support and services to their communities. A few examples of coordinated services are sharing resources across libraries, offering system-wide learning opportunities for staff, and using one cataloging software to make items available across the Library Federation.

A **Federated Administrative Unit** oversees the management of the Library Federation. A Federated Administrative Unit can be one of the Federated Member Libraries or can be a stand-alone entity. This unit's system board provides direction to the member libraries and creates some policies that apply to all of them. This board is also delegated to approve the funding formula for the library federation and its distribution to the Federated Member Libraries.

Federated Member Libraries are local public library outlets in a Library Federation. Each has a board of trustees and creates policies while also following policies developed by the system board. They must offer free access to everyone in their entire system service area.

Examples of a Library Federation are below, and are not inclusive of all library federations in Pennsylvania:



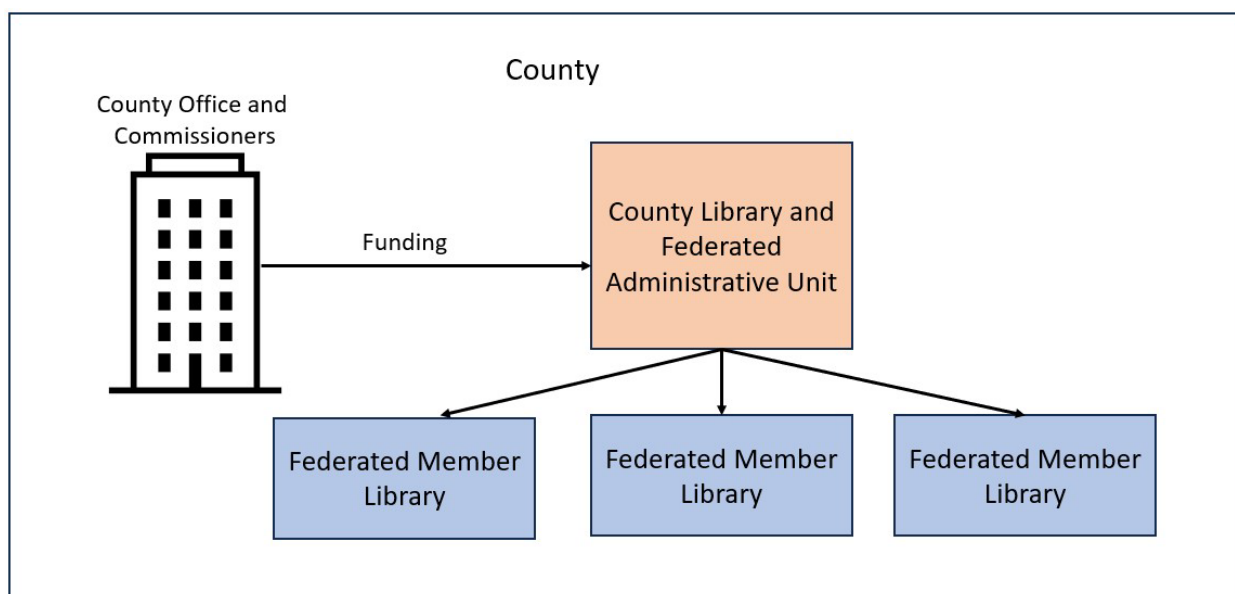


If you're unsure about the type of library you govern as a trustee, please check with your library director and board president.

County Library

A **County Library** is a local library or a division of a local library that receives funding from the commissioners of the county for the express purpose of making its resources and services available for free to everyone in their county and bringing direct library service to those in the county not served by other local libraries located within the same county.

An example of a County Library is shown below, and not inclusive of all types of county libraries in Pennsylvania:

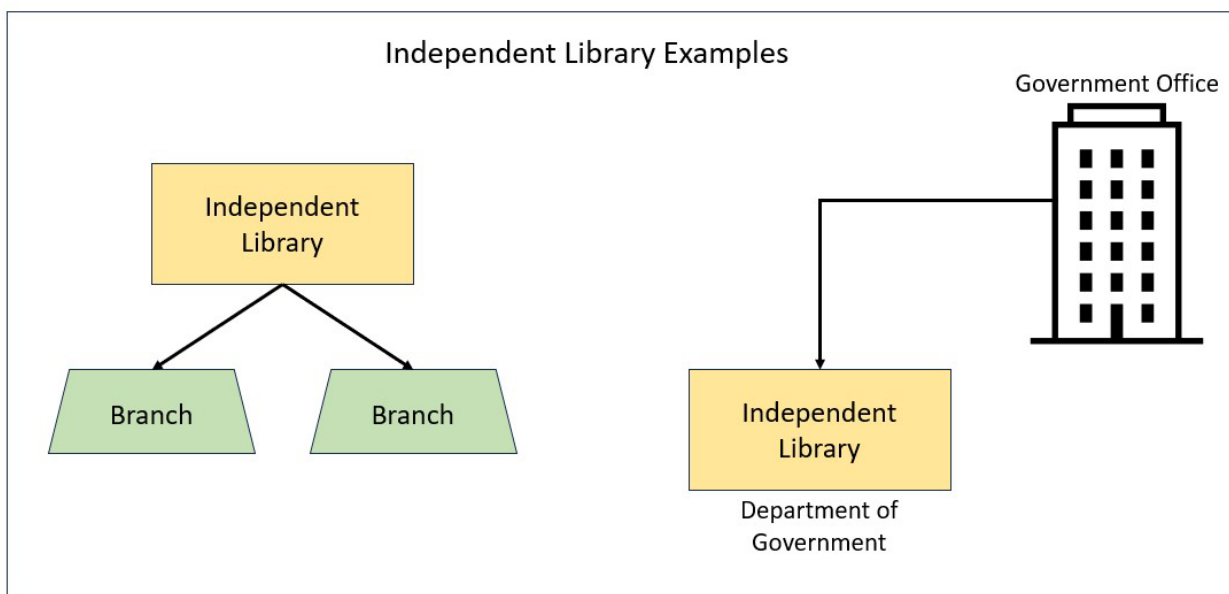
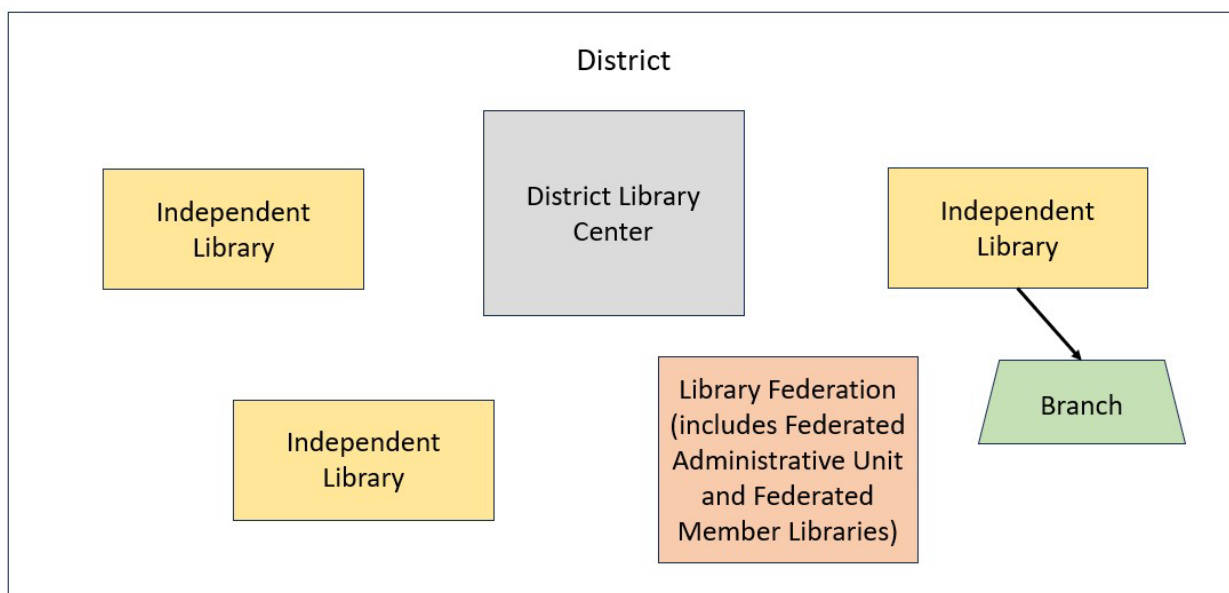


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Independent Library

An **Independent Library** is a public library outlet that's not a member of a library federation. It has a board of trustees and is responsible for providing free access to everyone in its service area.

Examples of Independent Libraries are shown below, and not inclusive of all types of independent libraries in Pennsylvania:

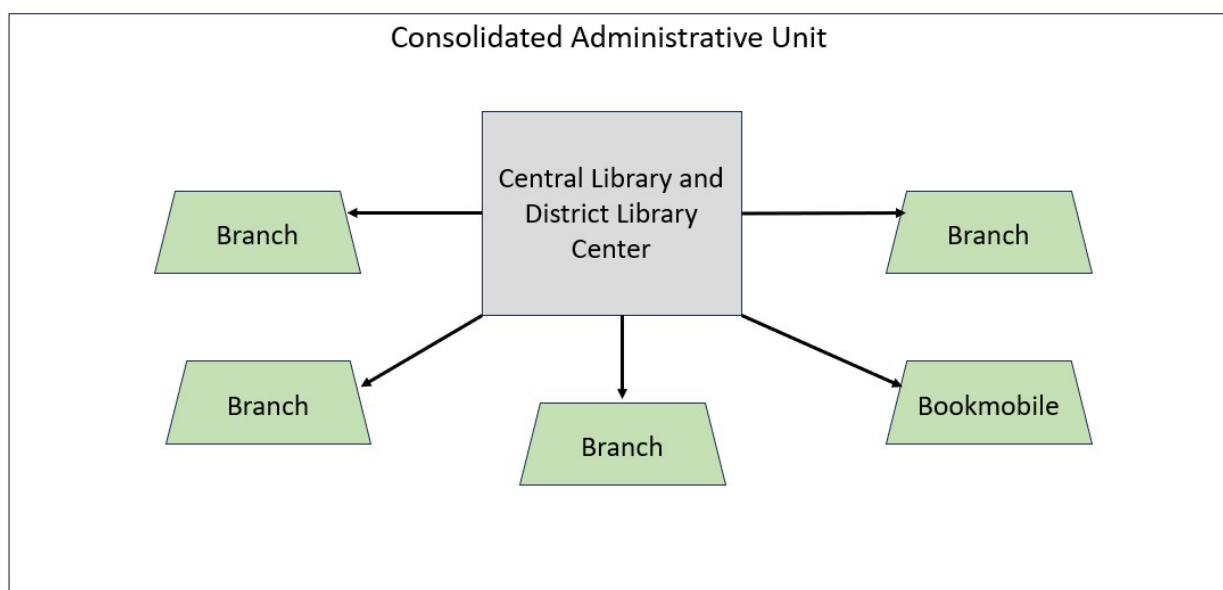


If you're unsure about the type of library you govern as a trustee, please check with your library director and board president.

Consolidated Administrative Unit

A **Consolidated Administrative Unit** is an entity that oversees the administration of a central library and its branches and bookmobiles. All libraries in this type of structure work together to provide consistent services.

An example of a Consolidated Administrative Unit is shown below, and not inclusive of all types of consolidated administrative units in Pennsylvania:

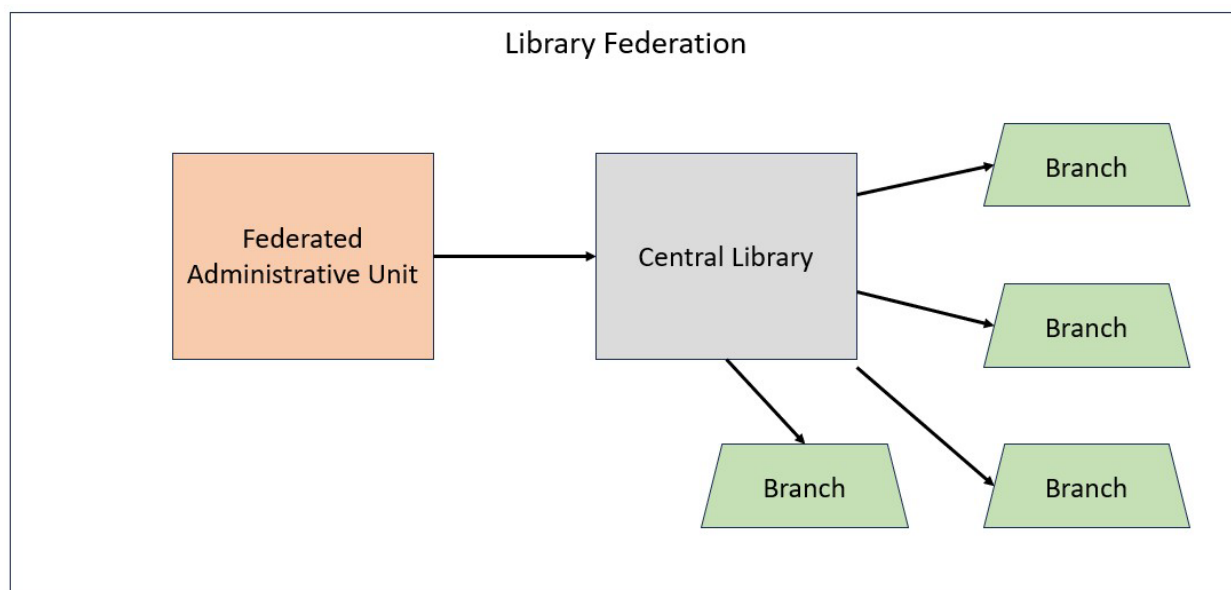


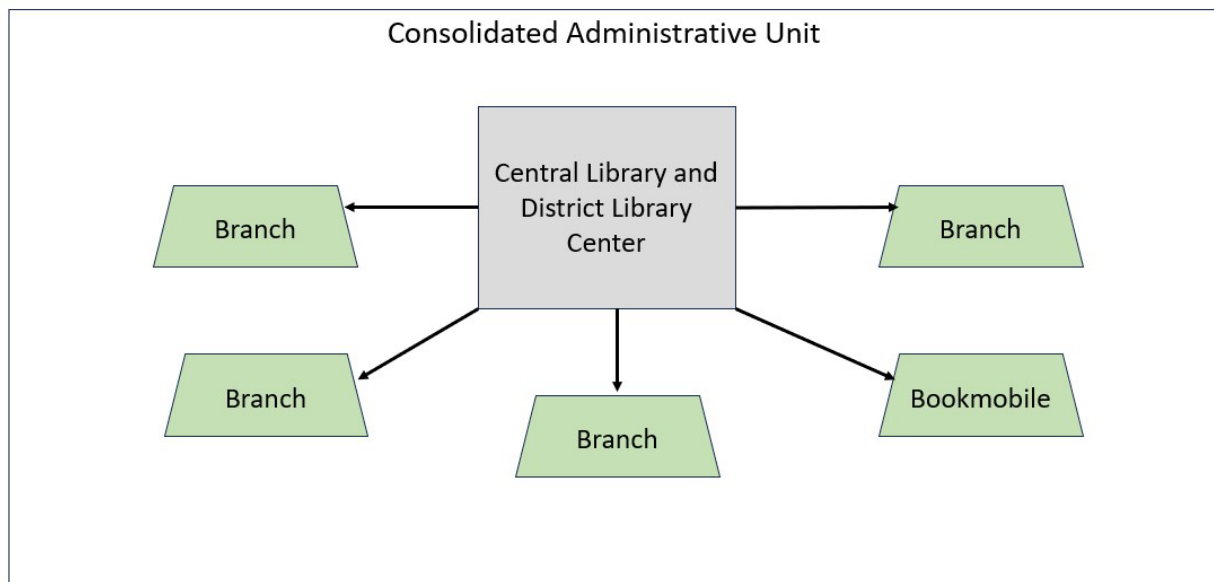
If you're unsure about the type of library you govern as a trustee, please check with your library director and board president.

Central Library

A **Central Library** is a public library location designated by a Consolidated Administrative Unit or Federated Administrative Unit to have branch locations. All locations in this structure are governed by one board of trustees and must offer free access to everyone in their service area. The Central Library is responsible to meet the standards of an Independent Library for the Consolidated System.

Examples of Central Libraries are shown below, and not inclusive of all types of central libraries in Pennsylvania:



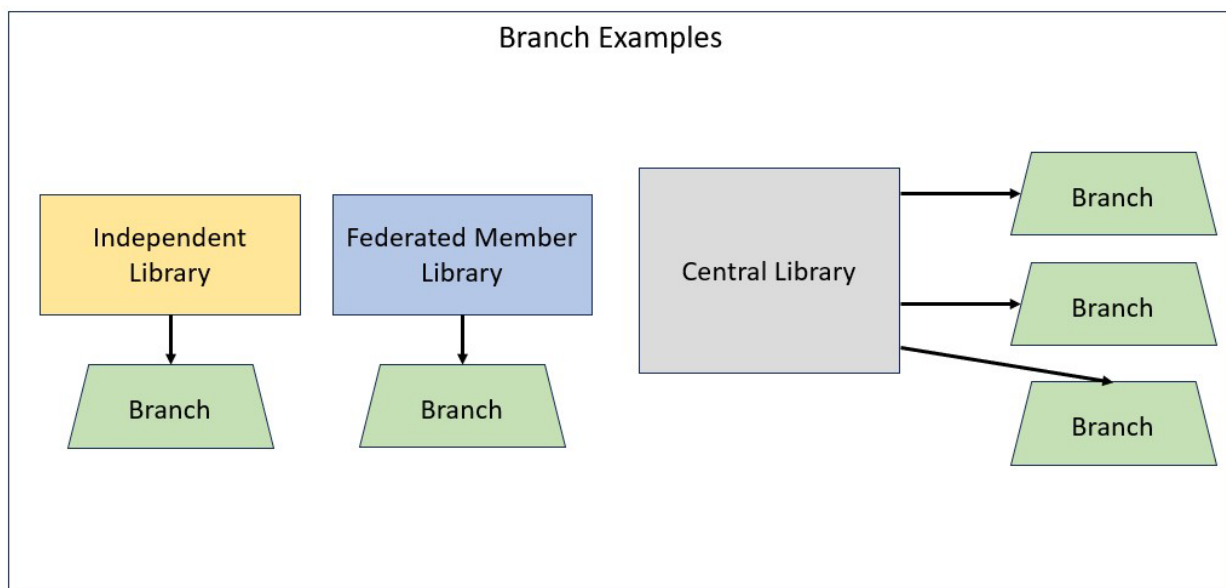


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Branch

A **Branch** is an outlet of a local library, managed by a central library and governed by the central library's board of trustees, and must offer free access to everyone in its service area. The branch must operate in its own separate space from the Central Library, have an organized collection of library materials, paid staff, and be open on a regular schedule of hours to the public.

Examples of Branches are shown below, and are not inclusive of all types of branches in Pennsylvania:

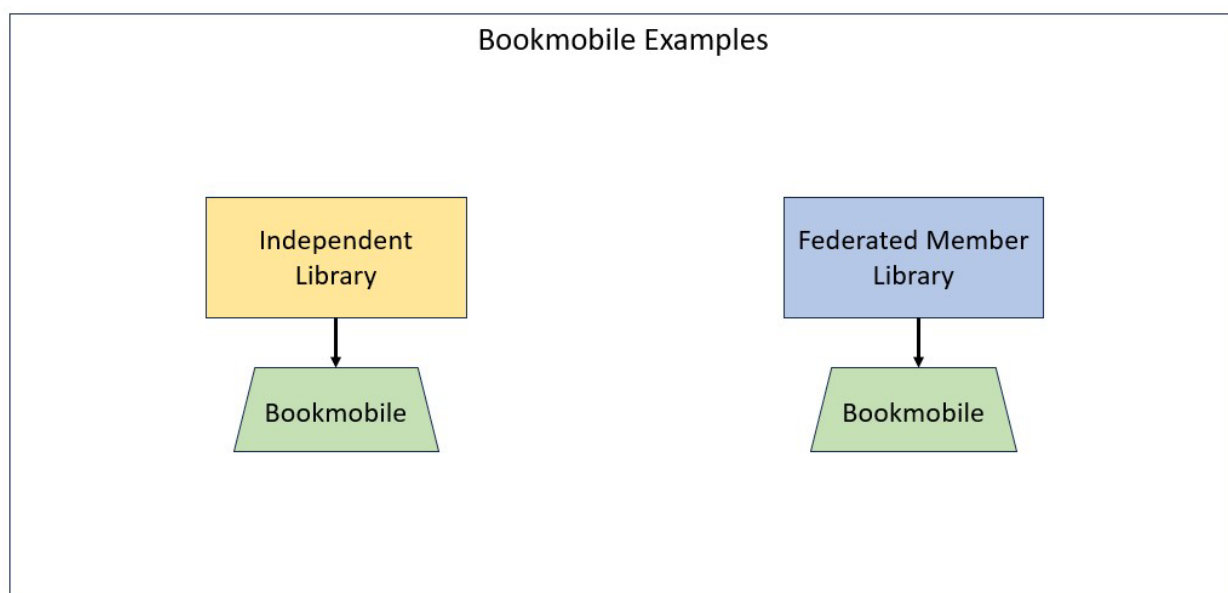


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Bookmobile

A **Bookmobile** is a library outlet managed by a local library and governed by the local library's board of trustees. It should be a vehicle that carries an organized collection of library materials, has paid staff, and offers regularly scheduled hours (stops in the route) for being open to the public. This mobile library provides books, programming, and other library services directly to people and organizations as part of a library's outreach in the community.

Examples of Bookmobiles are shown below, and not inclusive of all types of bookmobiles in Pennsylvania:



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Library as an Authority of Government

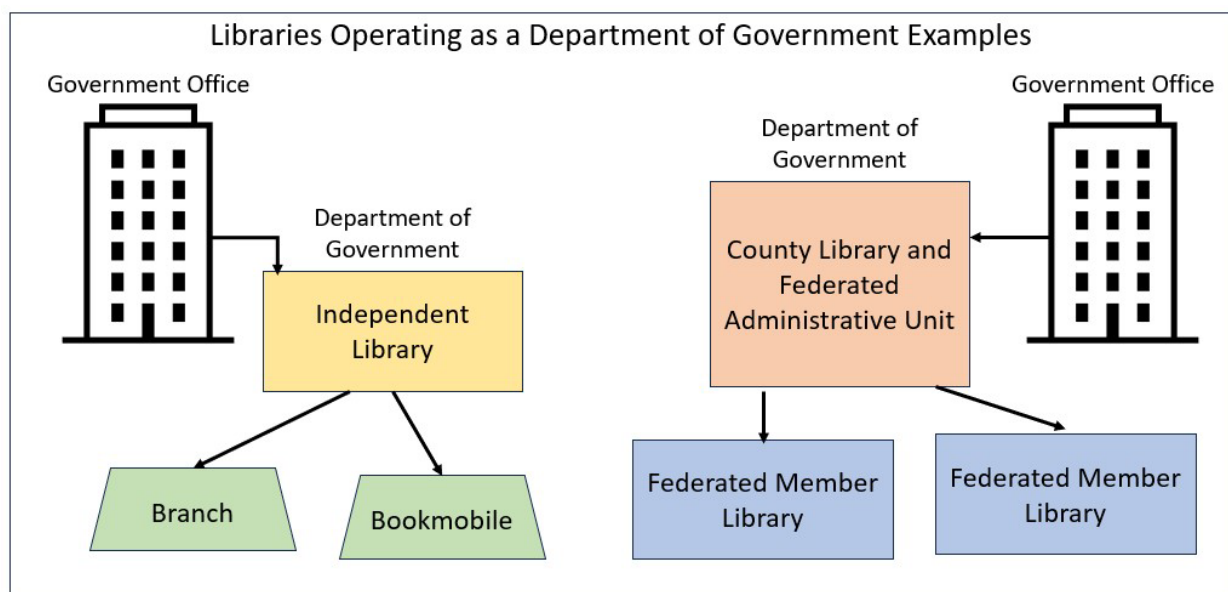
A **Library as an Authority of Government** is an organization that provides library services to the public (considered a public works project) without receiving a dedicated governmental tax. They are not a department of government or a County Library. Under the [Municipality Authorities Act](#) (June 19, 2001, codified at 53 Pa. C.S. § 5601 - § 5622), the public works projects must be in the proprietary fields of government, must have a public interest, and must be self-sustaining. These libraries accomplish their mission without direct financial support of counties, municipalities, and school districts and are considered separate legal entities. More information about municipal authorities can be found in the 11th edition (2020) of [Municipal Authorities in Pennsylvania](#) by the PA Department of Community and Economic Development (DCED).

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Library Operating as a Department of Government

A **Library Operating as a Department of Government** (like a borough, township, or municipality) is a local library, and its management can be impacted by this governmental connection. Library staff are employees of the governmental unit, and the library is governed by government officials. The library may have an advisory board; however, all legal decisions are made by the governmental unit. The level of involvement of the advisory board is dictated by the governmental unit and can involve a level of governance.

Examples of Libraries Operating as a Department of Government are below, and are not inclusive of all libraries operating as a department of government in Pennsylvania:



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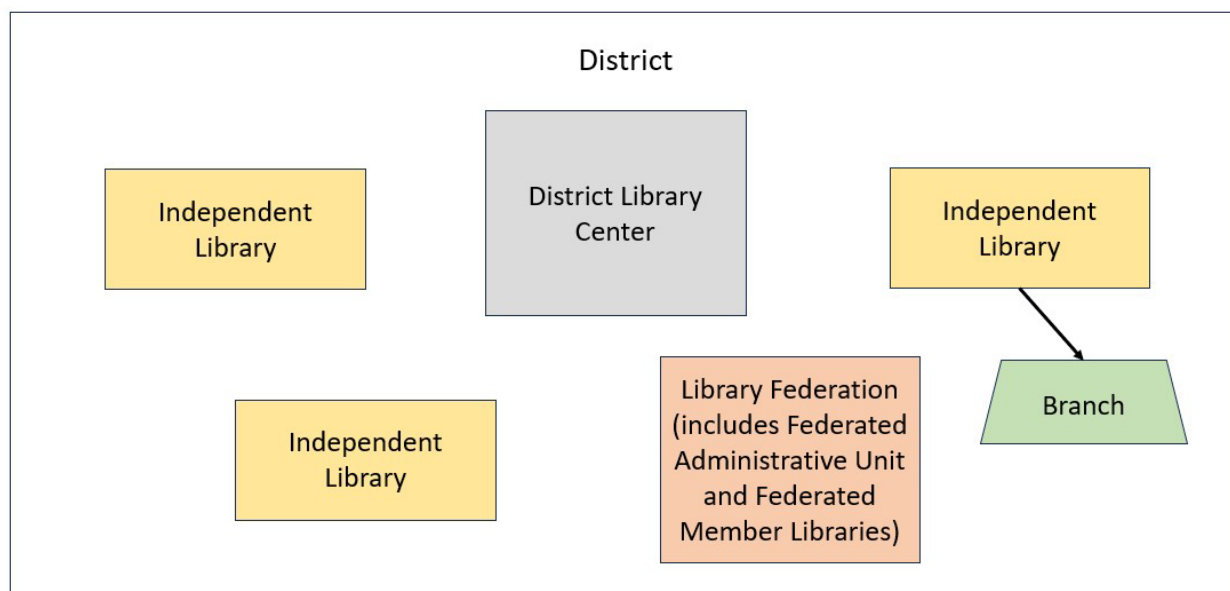
Library as Part of a Council of Government

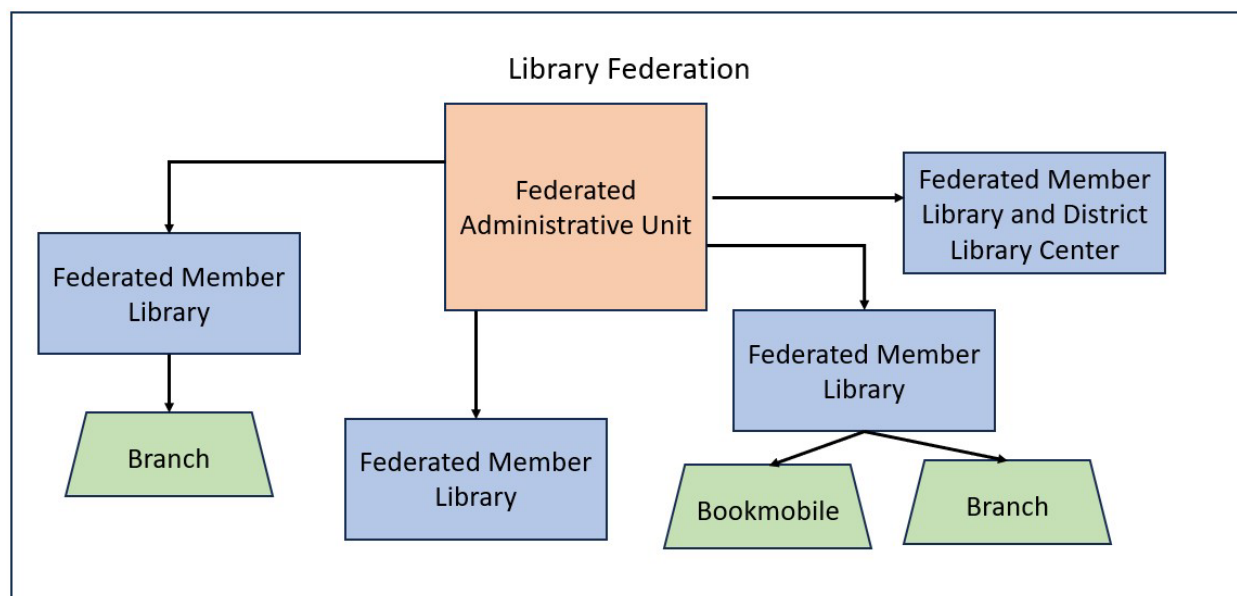
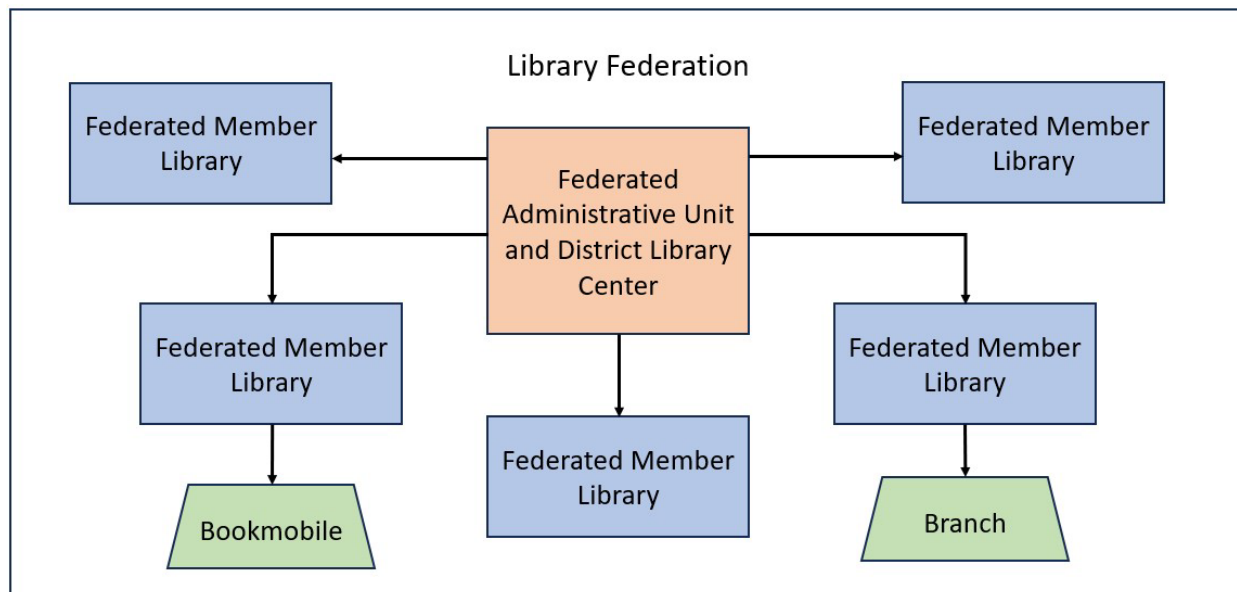
A local library may also be part of a **Council of Governments (COG)**, which is a regional planning organization that delivers various programs and services to its member municipalities. COGs are built on principles of accountability, transparency, and collaboration among the different service entities within the organization. Member local governments decide which services are most valuable for their communities and how resources and funds should be allocated. The COG, in turn, is accountable to these member governments as they collectively strive to improve the quality of life in their region.

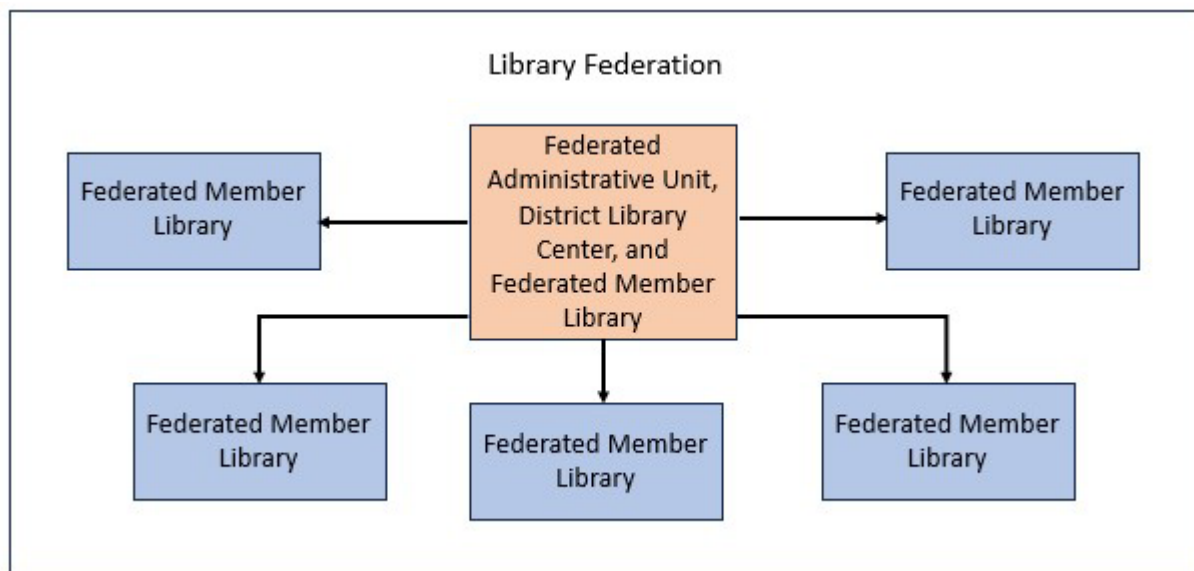
District Library Centers

District Library Centers are local libraries that help coordinate services of local libraries within their district library center system. They may contract with a municipality, board of trustees, or managers of a local library to become part of the system and may offer free library services to every community member in the district. These centers provide additional support to local libraries and may share or collaborate with other district library centers in providing library services. The primary purpose of State aid to district library centers is to enable these libraries to exercise leadership in developing a coordinated system of library services among all the local libraries of the district to bring maximum diversity, quality, and use to all the residents of the district. Currently, 29 district library centers are in Pennsylvania, and all state-supported public libraries are members of a district. More information about District Library Centers can be found in the [District Library Center LibGuide](#). Reviewing your District Negotiated Agreement (DNA) is also a helpful source of information to learn more about your district library center and its role.

Examples of a District Library Center are shown below, and not inclusive of all types of district library centers in Pennsylvania:







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Statewide Library Resource Centers

There are four **Statewide Library Resource Centers in Pennsylvania**: The Free Library of Philadelphia, the State Library of Pennsylvania, the Pennsylvania State University Library, and the Carnegie Library of Pittsburgh. These libraries gather significant research materials and make them available to residents across the Commonwealth. They operate under rules set by a board of head librarians from each Statewide resource center, led by the State Librarian.

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Library as a Nonprofit

A library in Pennsylvania that operates as a **Nonprofit Organization** has applied for and received nonprofit status from the Bureau of Corporations and Charitable Organizations. This is done by filing specific paperwork, including Articles of Incorporation – Nonprofit, and a docketing statement. Being recognized as a nonprofit in Pennsylvania may make a library eligible for certain benefits, like exemptions from state sales, property, and income taxes. Nonprofit libraries in Pennsylvania are generally established for charitable purposes.

These libraries follow both the [Nonprofit Corporation Law in Pennsylvania \(Title 15 - Subpart C\)](#), [state laws and regulations](#) for charities, and [Pennsylvania Library Laws](#). Most recently, [Act 122 of 2022](#) made changes to two sections of Pennsylvania law (Title 15 and 54) that also affect nonprofit organizations. Reporting requirements for qualifying Pennsylvania nonprofits can be found on the [Department of State's website](#). [PANO](#) (Pennsylvania Association of Nonprofit Organizations) and the Cheshire Law Group provide a [helpful overview](#) of the impact of these changes, outlining what the changes mean for nonprofits, due dates, and steps in Pennsylvania's new annual report filing requirement.

As of 2024, 400 public libraries in Pennsylvania operate as nonprofit organizations.

Here are additional resources you might find helpful:

- The [Bureau of Corporations and Charitable Organizations](#) webpage.
- The Commonwealth's webpage on [charities in Pennsylvania](#), along with information on [excluded or exempt organizations](#).
- The Commonwealth's webpage on [PA Nonprofit Corporations](#).

If your library is a nonprofit organization, be sure to review your bylaws and consult your legal counsel to understand how nonprofit status may impact your library as an organization.

If you're unsure about the type of library you govern as a trustee, please check with your library director and board president.

Non-State-Aided Library

A **Non-State-Aided Library** is a type of library that does not receive State Aid funding and is not required to meet any of the standards in the Library Code. They may not have a specific area they serve, and can either be managed by paid staff or volunteers. If the library is part of a library federation or library system, the system might set its own rules or guidelines for how this library operates.

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Free Libraries in the Community

In your community, you might come across free book exchanges, often called ‘**Little Free Libraries**.’™ These are usually small wooden boxes placed around the community where people can take a book or leave one to share, and they are available anytime, day or night.

[Little Free Libraries](#) is a nonprofit organization that runs a network of these book exchanges. Little Free Libraries can be found across the Commonwealth, and there are more than 150,000 registered Little Free Library book-sharing boxes in 120 countries around the world. To find one near you, check out this [interactive map](#).

Resources:

Types of Libraries Section

- *Pennsylvania Statute, Title 15 - Corporations and Unincorporated Associations.* Retrieved 2025, from <https://www.legis.state.pa.us/WU01/LI/LI/CT/HTM/15/15.HTM>
- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93 Public Library Code, §§ 9302, 9313, 9314.* Retrieved 2024, from <https://www.pa.gov/content/dam/copapwp-pagov/en/statelibrary/documents/for-libraries/library-laws-and-regulations/pennsylvanialibrarylaws.pdf>
- *Pennsylvania Consolidated Statute, Title 53, Municipal Authorities Act, § 5601 - § 5622.* (June 2001). Retrieved 2025, from <https://www.legis.state.pa.us/WU01/LI/LI/US/HTM/2001/0/0022..HTM>
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- Commonwealth of Pennsylvania, Department of State (2025). *Charities*. Official Website of the Commonwealth of Pennsylvania. Retrieved 2025, from <https://www.pa.gov/agencies/dos/programs/charities.html>
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Introduction to the Office of Commonwealth Libraries and Library Laws

This section introduces the Office of Commonwealth Libraries (OCL), part of the Pennsylvania Department of Education, which leads and supports libraries across the state. Through its two main divisions (the Bureau of Library Development and the Bureau of State Library), the OCL helps libraries provide inclusive services, manages funding programs, and promotes equitable access to information. You'll also learn about the OCL's key initiatives, federal funding programs and grants, and the role of the Governor's Advisory Council. Additionally, this section explains the legal and regulatory framework that guides public libraries in Pennsylvania, and a helpful overview of relevant statutes and resources that may apply to local library operations.

Office of Commonwealth Libraries

The Office of Commonwealth Libraries (OCL) is part of the Pennsylvania Department of Education (PDE). Its role is to support, develop, and provide library services for learning and advancement. It includes two bureaus: the [Bureau of State Library](#) and the [Bureau of Library Development](#). The OCL is led by the [Deputy Secretary of Education, Commissioner for Libraries, and State Librarian](#), a position appointed by the Secretary of Education.

The OCL and its bureaus aim to:

- **Support Community Well-Being:** Ensures libraries are inclusive, safe, and welcoming. Provides resources, services, and programs to help everyone in Pennsylvania have equity of access to opportunities and good outcomes.
- **Offer Training and Support:** Provides ongoing training for library staff to help develop their skills and overcome challenges in delivering library services.
- **Guide the Public:** Uses their expertise as a law library and government document repository to help people navigate state and federal policies and laws.
- **Build Strong Connections:** Fosters strong relationships with local and state communities, listens to diverse voices, and supports the goals of all users and learners.
- **Lead in Library Awareness and Support:** Promotes broader use of best practices to library and archives communities that ensure equity of access to information and library services.

Bureau of Library Development

The Bureau of Library Development (BLD) helps libraries in Pennsylvania by managing state and federal funding programs and grants. These funds include the [Library Services and Technology Act \(LSTA\)](#), [Library Access](#), [LAMP \(Library of Accessible Media for Pennsylvanians\)](#), the [Public Library Subsidy](#), and [Keystone Grants for Public Library Facilities](#). The Bureau also offers advice, training, and professional development for library staff at public, school, academic, and special libraries.

What is LSTA? The [Institute of Museum and Library Services \(IMLS\)](#) provides federal [Library Services and Technology Act \(LSTA\)](#) funding to states through its [Grants to States program](#). In Pennsylvania, the Pennsylvania Department of Education's (PDE) Office of Commonwealth Libraries (OCL) administers these funds to support the goals outlined in the OCL's IMLS-approved [5-year plan](#). Visit [Pennsylvania's IMLS state profile page](#) on the IMLS website to learn more about Pennsylvania's LSTA program and to review the [2018-2022 LSTA Grants to States Program Implementation Evaluation](#) report as the most recent evaluation.

What is Library Access? The [Library Access](#) budget line in Pennsylvania's budget helps support important library services including:

- [POWER Library](#): An online portal providing access to a wide range of digital resources and services.
- [Interlibrary Delivery Service \(IDS\)](#): A delivery and shipping system that helps participating libraries share resources with each other, providing a more cost-effective and easier way for people to borrow books and materials from libraries throughout Pennsylvania.

What is LAMP? The [Library of Accessible Media for Pennsylvanians \(LAMP\)](#) is a free braille and accessible media service for people with temporary or permanent low vision, blindness, or a physical disability that prevents reading or holding a book. Support for this service is offered at library branches in Philadelphia and Pittsburgh to patrons throughout the Commonwealth.

What is the Public Library Subsidy? State Aid, also known as the [Public Library Subsidy](#), is paid to public libraries that meet standards (or received a waiver for these standards) found in the Public Library Code ([24 PA. C.S. Education. Chapter 93](#)), and the Pennsylvania Code ([22 PA Code §131; §141.](#)). The state aid formula ([Public Library Code §9334 – 9340](#)) has not been in use since 2003 when significant state budget cuts occurred. As a result, laws are enacted each year that detail how state aid is distributed.

What are the Keystone Grants for Public Library Facilities? The [Keystone Recreation, Park and Conservation Fund](#) was established by an act of the General Assembly in 1993. The OCL administers the public library portion of this program funded from a portion of real estate transfer taxes. Grants pay up to 50 percent of eligible costs to plan, acquire, construct, or rehabilitate public library facilities.

You can find more information on the [Bureau of Library Development's LibGuide](#).

Bureau of State Library

The [State Library of Pennsylvania](#) traces its historic roots to 1745 when the General Assembly requested that its Clerk, Benjamin Franklin, order a set of the English Statutes and some maps for reference use. It has grown to one of the largest collections of materials about Pennsylvania and serves the information and research needs of all branches of State Government. As a statewide resource center and law library, the State Library provides residents with Pennsylvania State and U.S. Government Documents, print materials, digitized collections, online reference services and automated resources. Rapid access to other state and national collections is available through online systems, networks, interlibrary cooperation and databases. The Rare Collections Library includes the Provincial Assembly Collection, a historic collection of rare colonial imprints and the largest collection of Pennsylvania newspapers in the world. You can access the [library's catalog online](#), as well as the [library's digital collections](#).

To learn more, visit the State Library of Pennsylvania's website for [contact information and hours](#) - you're always welcome to visit!

The Governor's Advisory Council

The Governor's Advisory Council (GAC) on Library Development is established by the Public Library Code ([24 PA.C.S. Education § 9312.](#)). It has twelve members appointed by the Governor.

The GAC's responsibilities include advising and making recommendations to the Governor, the Secretary of Education, and the Deputy Secretary of Education, Commissioner for Libraries, and State Librarian on the State Library of Pennsylvania's policies and operations, as well as the Pennsylvania's system of State Aid to libraries. The Bylaws of the Council are available [online](#).

In 2024, the GAC created this [Report to the Governor](#) to share the stories of Pennsylvania libraries. This report is an inspiring and helpful overview of libraries supporting their communities across the Commonwealth.

For more information on the GAC's responsibilities, refer to the [Public Library Code](#), the [Guidelines \(Policies\)](#) approved by the GAC, their [bylaws](#), and [website](#).

Resources:

Makeup of the Office of Commonwealth Libraries Section

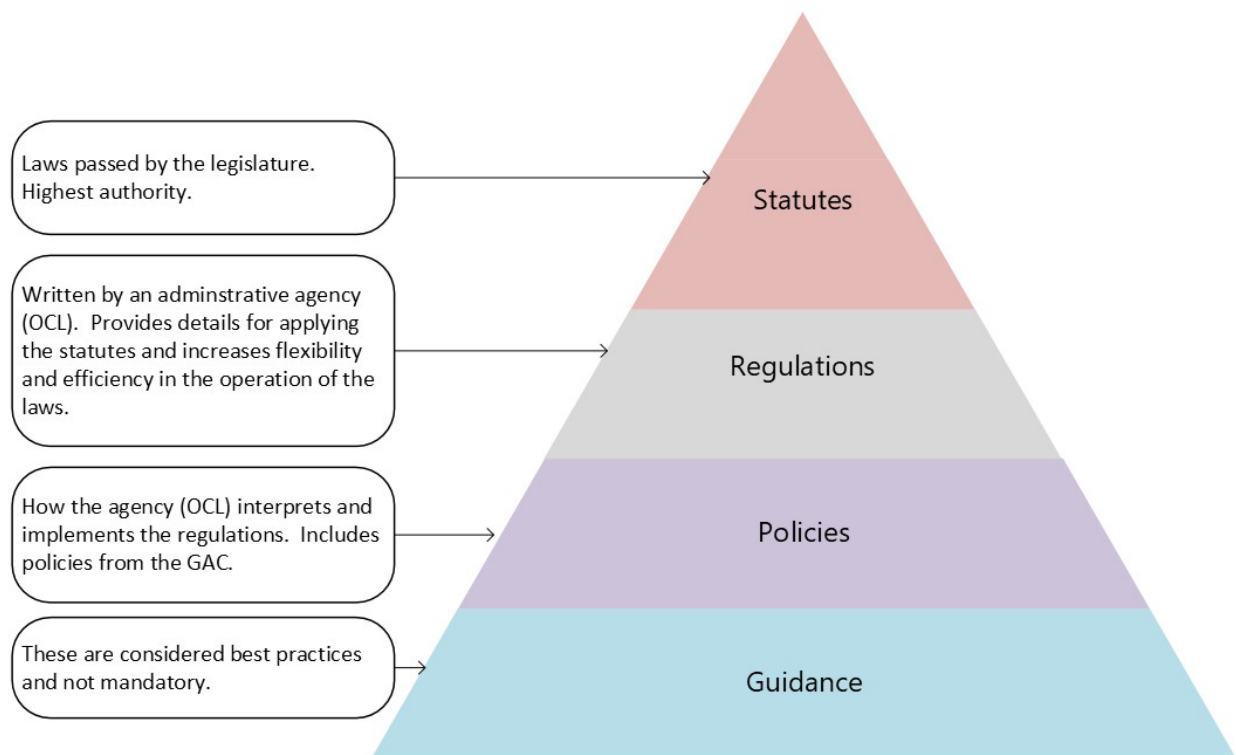
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Statutes, Regulations, Policies, and Guidance

Public libraries follow statutes, regulations, and policy to receive State aid. Guidance is offered by the Bureau of Library Development to libraries when questions arise.



[Statutes](#) are laws enacted by the legislature. [Regulations](#) are written by administrative agencies (such as the Office of Commonwealth Libraries) to fill in the details of how to apply the statutes and increase flexibility and efficiency in the operation of laws. [Policies](#) are how the agency interprets and implements regulations, and this includes policies (guidelines) approved by the GAC. Guidance is considered best practice, and not mandatory.

An exposure draft of new regulations was developed by the OCL to clarify the intentions of the Statute and simplify the standards necessary for a library's receipt of State aid. You can

find more information on the exposure draft on the following LibGuide: [Library Regulations - Exposure Draft](#).

While the Bureau of Library Development (BLD) advises libraries on many topics, it is not a provider of legal advice, an advocacy organization, or a law enforcement agency. Public libraries are independent organizations and the BLD does not govern local library policies and activities or municipal decisions regarding libraries. The BLD's ability to hold libraries accountable to library laws is only related to the eligibility and standards required of libraries that receive state aid or other state and federal funds administered by the office.

Other Helpful Statutes and Resources

Other statutes and resources to be aware of include:

- [Child Internet Protection Act](#): Act that requires schools and public libraries to have an Acceptable-Internet Use Policy in place to receive federal funds and E-Rate discounts.
- [Fair Labor Standards Act](#): Establishes minimum wage, overtime pay, recordkeeping, and employment standards affecting employees in the private sector, and in Federal, State, and Local governments.
- [Family and Medical Leave Act](#): Entitles eligible employees to take unpaid and job-protected leave for family and medical reasons.
- [Handbook for Charitable Nonprofit Organizations](#) (2018): A guide from the PA Office of Attorney General outlining basic information that affect charitable nonprofit organizations.
- [IRS Compliance Guide for 501\(c\)\(3\) Public Charities](#): The IRS Code relating to nonprofit organizations.
- [Keystone Recreation, Park and Conservation Fund Act](#): Act that establishes a grant program for the planning, buying, developing, and improving public libraries.
- [Public School Code](#) and [Fiscal Code](#): Codes that determine how State aid funds (also known as Public Library Subsidy funds), are distributed for specific years.
- [Sales, Use and Hotel Occupancy Tax](#): While libraries can be exempt from paying sales tax on some items purchased, they are not exempt from collecting and paying sales tax on items they sell. See the [Retailer's Information Guide \(REV-717\)](#) or the more detailed [Taxability Lists](#) for more information.
- [Sarbanes-Oxley Act of 2002](#): Federal law that requires certain practices in financial record keeping and reporting for corporations.
- [Small Games of Chance Regulations](#): Outlines what is required when having small games of chance, such as raffles.

- [Title 15, PA. C.S. Corporations and Unincorporated Associations, Chapter 51, Subpart C: Nonprofit Corporations](#): Nonprofit law that applies to any library legally established as a 501(c)(3) organization.
- [Title 18, PA. C.S. Crimes and Offenses](#): Defines library theft, prosecution for overdue materials, and offenses against public order and decency.
- [Title 23, PA. C.S. Domestic Relations \(Child Protective Services Act\)](#): Mandates suspected child abuse reports from library staff and volunteers (the website [Keep Kids Safe](#) provides more information on complying with these laws).
- [Title 65, PA. C.S. Sunshine Act](#): Requires any state or local government body and all sub-units appointed by that body to deliberate and take official action on agency business in an open and public meeting. More information on this act can be found on the [Office of Open Records \(OOR\)](#) website. Depending on how your library is structured, this may or may not apply - ask your library's legal counsel to determine if this applies to your library.
- [Wages and the Fair Labor Standards Act](#): Establishes the minimum wage, overtime pay, recordkeeping, and youth employment standards affecting employees.

Talk with your library director, board president, and library legal counsel about what statutes and resources above pertain to your library, and if there are any others that may apply.

While the Bureau of Library Development (BLD) advises libraries on many topics, it is not a provider of legal advice, an advocacy organization, or a law enforcement agency. Public libraries are independent organizations and the BLD does not govern local library policies and activities or municipal decisions regarding libraries. The BLD's ability to hold libraries accountable to library laws is only related to the eligibility and standards required of libraries that receive state aid or other state and federal funds administered by the office.

Resources:

Statutes, Regulations, Policies, Guidance, and Other Information Section

- *Pennsylvania Code, Title 22, Part IX. State Library and Advisory Council On Library Development, §§131; 141.* Retrieved 2024, from www.pacodeandbulletin.gov/Display/pacode?file=/secure/pacode/data/022/partIXtoc.html&d=
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Introduction to Learning About Your Library

Starting your role as a library board trustee is an exciting opportunity to make a meaningful impact on your community. This section is designed to help you understand what may be offered to you in a board orientation, a listing of documents that may be available for you from your library, and how to get familiar with your library's structure, services, and funding.

Orientation

As a new board trustee, one of the most valuable experiences you can have is an orientation to your new role. Understanding the library and how it's run before you start is key to your success. Even if you've served as a trustee for another organization, libraries as public institutions are often unique in how they operate.

Orientation is typically led by the library director, an orientation team, or offered by your library district or library system, and can cover important topics, including:

- Access to an orientation packet with helpful materials (see the *Helpful Documents to Review* section for suggestions).
- The history of the library, including its mission, vision, and values.
- The library's governance structure, and your responsibilities as a trustee.
- The roles and responsibilities of a library trustee, and how they differ from the roles and responsibilities of a library director.
- What type of local library it is, if it's part of a federated system, and information about its district library center.
- A full walk-through of the library, including staff-only areas.
- Historical knowledge about how the library is set up, its sources of funding, and how the community uses and supports the library.
- Information about the community the library serves.
- The library's budget, other important financial details, and current reports.
- The library's current strategic plan and an update on its progress.
- Any recent opportunities or challenges the library is facing.
- The programs and services the library offers, and highlights over the last year.
- The library's website, and where to find important information as a trustee.
- Key stakeholders and partnerships with other organizations.
- How much time is expected from you as a trustee.

- The different committees and their work.
- The expectation that trustees make meaningful financial contributions through donations.
- The importance of fundraising for the library.
- Opportunities to meet and connect with other trustees.
- Ongoing learning opportunities to help you get comfortable in your role.

These items should be guided, facilitated, or explained by those leading the orientation. Support may be needed from the library director or staff.

More information on board orientation is in the [Learning About Your Library](#) section of the LibGuide, and a sample orientation checklist is available in the [Appendix](#).

Considerations:

Do you have in place, a ‘board buddy’ program to welcome and support new trustees? Pairing a new trustee with an experienced trustee can be a powerful way to ease the learning curve, foster connection, and build confidence. A trusted go-to person for questions, insights, and shared experiences can make all the difference as new trustees find their footing and grow into their role.

For library directors and board presidents: It's a great idea to set up an informal meet-and-greet before a new trustee's first official board meeting. This could be a casual lunch, a gathering with snacks, or another type of social event. This allows new trustees to get to know the rest of the board and helps them feel more comfortable, encouraging them to engage, ask questions, and become involved more quickly.

Helpful Documents to Review

Some documents that might be helpful as you start your role as a board trustee include the following, but not all of them may apply to your library:

Board Trustee-Focused:

- Board Trustee Agreement/Commitment to Serve
- Board Trustee Job Description
- Board Trustee Member List
- Board Committee List
- Prior board meeting minutes
- Listing of upcoming meeting dates
- Agenda for your first board meeting
- Conflict of Interest Policy and Attestation Statement

Organizational Documents:

- Articles of Incorporation
- Bylaws
- IRS Determination Letter (if a 501c3 organization)
- Recent Form 990 (if a 501c3 organization)
- Library Director Job Description
- Organization Chart of Roles/Staff

Financial Documents:

- Current Annual Budget
- Recent Profit & Loss Statement
- Recent Statement of Financial Income
- Recent Audit or Financial Review

Insurance Documents for Managing Risk: (this is a partial listing, please check with your insurance broker for what may apply to your library)

- Automobile Insurance
- [Bonding](#) of the Treasurer (\$9318 Local Library Governance (e))
- Business Income Insurance
- Commercial Property Insurance
- Data Breach/Cybersecurity Insurance
- Director and Officer Liability Insurance
- Employment Practices Insurance
- Fire and Theft Insurance
- Flood Insurance
- General Liability Insurance
- Unemployment Insurance
- Volunteer Liability Insurance

Current and Future Planning Documents:

- Recent PA Public Library Data Survey (also known as the Annual Report)
- Current District Library Center Agreement
- Current Library Federation or Library System Member Agreement
- Current Strategic Plan

Policies (these to start, reading others will help):

- Board Meeting Attendance Policy
- Right to Know/Open Records Policy
- Personnel Policy Manual (including):
 - Conflict of Interest Policy
 - Record Retention Policy
 - Whistleblower Policy

- Workers' Compensation Policy
- Collection Management / Request for Consideration of Materials Policy
- Meeting Room Policy
- Internet Use Policies at the library (including the Children's Internet Protection Act)
- Confidentiality of Patron Records Policy
- Patron Privacy Policy
- ALA's Library Bill of Rights, Intellectual Freedom, Freedom to Read and Freedom to View statements.
- Photography Policy
- Public Comment Policy
- Customer Behavior Policy
- Social Media Policy

Community-Focused Documents:

- Annual Report to Funders
- Appeal Letters
- Communications to community and stakeholders
- Listing of upcoming important events, including major programs and fundraisers

Talk with your library director and board president about what documents above apply to your library and any other documents helpful for you.

Resources

Board Orientation Section

- BoardSource. *Board Orientation* (2022). Retrieved 2024, from boardsource.org/resources/board-orientation/ (*Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.*)
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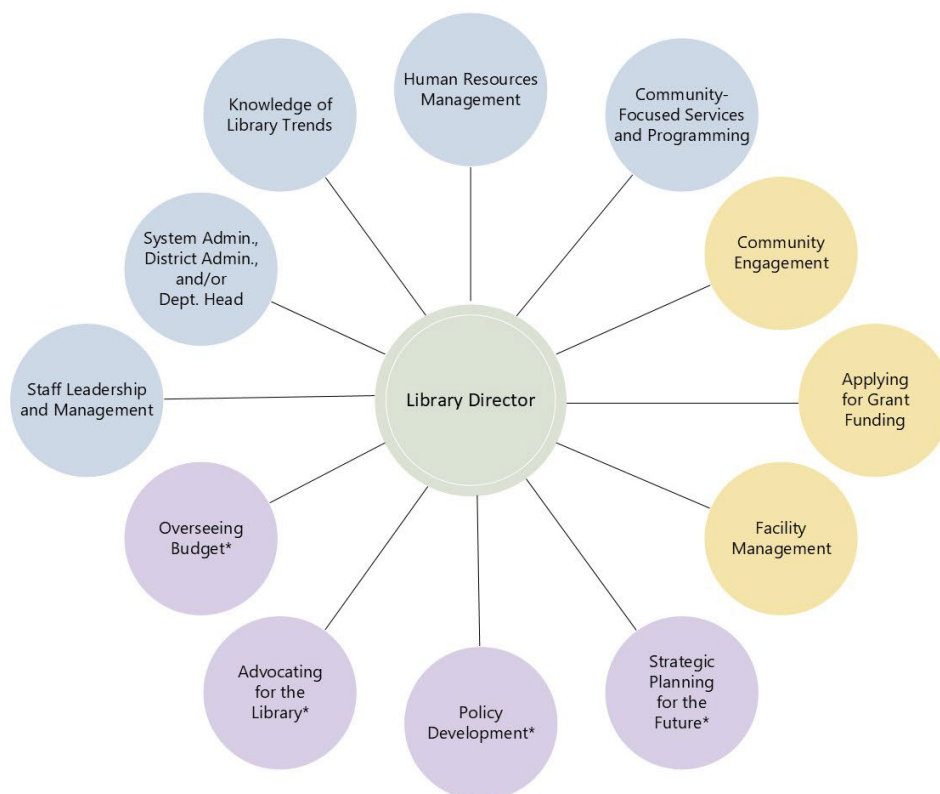
Your Library Director

Meeting with your library director at the beginning of your board term is essential to setting the stage for a meaningful connection and learning about the library, its services, and the community it supports.

Your library director is the leader and face of the library, and they are the board's only employee. Their role includes (but is not limited to) managing the library facility (or facilities), leading the staff, overseeing the library's budget, and engaging with the community. Your library director helps the board plan strategically, set policy, and advocate for the library. It's a role that balances relationships with many, including government, partners, funders, and staff. This role involves planning for the library's future, understanding the community's needs and aspirations, and being ready to act to meet those needs. Your library director may also have the title of executive director, chief manager, or chief executive officer.

In some libraries, the library director also acts as a system administrator. This role supports member libraries of the federation and coordinates planning, policies, and funding for these libraries. Library systems often support countywide or multi-countywide communities. In other libraries, the library director also acts as a district administrator. This role is the leader of the district library center and partners with the district consultant librarian to support libraries within their district. Additionally, a library director can also act as both a system administrator and a district administrator. In cases where the library is part of a government entity, the library director can also act as a department head within the government.

The responsibilities of a library director will vary depending on the library's type, size, and number of staff. Some libraries operate with few staff, while others have many employees. Some library directors are responsible for providing library services and programming, applying for grant funding, management of the facility, handling marketing and advertising, and human resources management. Others manage staff who handle these roles in the library.



*THIS ACTIVITY HAPPENS WITH BOARD OF TRUSTEES

THERE CAN BE COLLABORATION BETWEEN THE LIBRARY DIRECTOR AND BOARD TRUSTEES ON OTHER ACTIVITIES

Board trustees can often help their library director with many of the tasks listed above that are not marked with an asterisk. Trustees can use their skills and experience to support their library director in management of the facility, connect and engage with the community on behalf of the library, or help the library director in completing grant applications. There may even be dedicated board committees in place to assist with these areas, where the library director facilitates the conversations within and across the committees to help the library and board move forward in their work. The relationship between the library director and board of trustees is one grounded in teamwork and focused on the library's mission, vision, and future in its community. This topic is discussed more in the [Board Trustees Responsibilities - Your Library Director](#) section of this manual.

If you're unsure how these responsibilities are handled for your library, talk with your library director or board president.

Your Board President

When you start as a board trustee, meeting with the board president will help you understand the governing role of the board and how the library is supported by the board. The board president and the library director partner in their work together, but they focus on different areas of responsibility.

The board president leads the board of trustees and oversees the overall governance of the library. They act as the main link between the board of trustees and the library director, and keep the board updated on important issues the library is dealing with.

Their responsibilities include:

- Leading all board meetings and working with the library director to create and share the meeting agenda and related materials ahead of time.
- Leading discussions during board meetings, encouraging trustees to participate, and ensuring that everyone is following the bylaws and library policies.
- Keeping board meetings on track, making sure the board uses their time efficiently and respects everyone's schedules.
- Maintaining respect and order during board meetings, ending discussions when needed, directing issues to the right committees, and delaying decisions until enough information is available.
- Signing official documents and representing the board in public, as directed by the board.
- Helping new trustees get oriented in their role, recruiting new board trustees, and reviewing the board's overall performance.
- Leading the hiring, evaluating, and termination processes of the library director.

More information on the role of the board president can be found in the [Governing the Library – Board Governance](#) section under the *Expectations of the Board President* tab, as well as the [Board Trustee Responsibilities – Board Development](#) section under the *Succession Planning* tab.

Touring the Library (or Libraries)

It's important not just to meet with your library director and board president, but also to get to know the library itself. By taking a tour of the community-accessible spaces, you'll see firsthand how the library serves as a welcoming and safe space and how the staff helps your community. You can learn more about their roles and how they contribute to the library's mission.

Additionally, a behind-the-scenes tour of the library can give you a better understanding of its real, day-to-day needs. It helps you see how the building and internal systems (such as heating, air conditioning, plumbing, etc.) support the library's ability to serve the community. Noticing what needs repair or improvement allows for better planning. Addressing these issues helps keep the building safe, sets priorities, and ensures the library can meet community needs well into the future.

If your library has several branches, visiting them will give you a broader understanding of how each branch supports the community and may reveal additional opportunities to serve the public. If you're on the board for a library system, visiting the federated libraries will give you a better picture of how the entire library network coordinates and serves the community. If your library is a designated district library center, visiting libraries across the district can provide you with a larger frame of reference of public libraries and their communities.

Website and Online Presence

Checking out the library’s website is another great way to learn about what the library offers to the community. On the website, you can find information about upcoming programs, access the library catalog, explore available digital resources, and discover other services the library provides.

Also be sure to connect with any social media accounts your library has so that you can stay informed about how the library is connecting to the community online.

Library Community Profile

The Office of Commonwealth Libraries now has a subscription to the data platform [PolicyMap](#). With the subscription, a Community Profile can be created specific to each state-aided public library's service area. They are snapshots of life in the library's community and include information on its population, racial composition, age, income, and more. Here is [sample Community Profile](#) from the [PolicyMap](#) website.

These profiles can be used to assist your library in strategic planning, collection development, grant applications, and more. To request your library's Community Profile, please complete the [Contact Us](#) form and select the "Public Library Community Profile" category from the drop-down list.

For questions concerning this topic, please reach out to Amy Geisinger at ageisinger@pa.gov.

Resource:

Office of Commonwealth Libraries - Bureau of Library Development (2025). *Public Library Community Profiles Now Available!* The Compendium. Retrieved 2025, from <https://compendium.ocl-pa.org/public-library-community-profiles-now-available/>

Individual Public Library Data

The Office of Commonwealth Libraries collects, edits and disseminates statistical information on state aided public libraries in the state. This information is shared with the Institute of Museum and Library Services (IMLS) and is part of a national effort to collect library data. Due to the reporting requirements set forth by the Institute of Museum and Library Services for the national Public Libraries Survey (PLS), data represented here may be different than the data shared locally.

Use the interactive report on the [Public Library and Funding Recipient Data LibGuide](#) to view information about a specific public library or combined federated library system.

Sources of Funding

As a board trustee, you are part of a board fully and legally responsible for the proper ethical management of the library's funds. A library's funding comes from several sources. These sources can vary based on the type of library, the community it serves, and the standards it needs to follow to receive State Aid funds. **As a board trustee, you are legally responsible for understanding and overseeing the library's finances.** To learn what funds make up the library's revenue, ask your library director and board president for a copy of the budget with an explanation of where the funds come from and how the funds are used.

Sources of funding can include:

State Funding:

- **State Aid Funding:** Known also as the Public Library Subsidy, these funds are paid to public libraries meeting the required standards outlined in the [Statute \(24 PA. C.S. Education. Chapter 93\)](#) and the [Regulations \(22 PA Code § 131; § 141.\)](#). More information about the levels of State Aid, including payment distribution information, is available on the [State Aid Resources for Pennsylvania Public Libraries LibGuide](#). The [Statutory Funding Formula \(§9334 – §9340\)](#) has not been in use since 2003 when significant state budget cuts occurred. As a result, laws are enacted each year that outline how state aid is distributed (more information can be found on the [State Aid Resources LibGuide](#) and [Section 2328. State Aid for Fiscal Year 2024-2025](#)).
- **Keystone Recreation, Park, and Conservation Fund Grants for Public Library Facilities (Keystone Grants):** Keystone grants are funds applied for and granted to municipalities with public libraries for approved large projects, including new buildings and major renovations. More information about this grant is available on the [State Library's Keystone Grants for Public Library Facilities](#) webpage.

Local Funding:

- **Local Government Funding:** This funding may include support directly from the library's county, school districts, or municipalities. Depending on your library

structure, you may receive funding through your federated system unit, a tax millage, per-capita allocations, or other earmarked funds from government sources.

- **Other Funding Sources:** This funding includes donations from local businesses, organizations, and community members. Other sources include United Way contributions, funds from the library's investments, money raised through events, and community donation appeals. [EITC](#) (Educational Improvement Tax Credit) funding is another local source – contact your [state elected officials](#) to learn more.

Federal Funding:

- **LSTA Grant Funding:** The [Library Services and Technology Act](#) is a federal program for libraries focused on technology services and access to library resources. State library agencies across the United States use LSTA grants to support subgrants to libraries.
- **Other Federal Revenue:** Includes federal employment program revenue, funds received for renovations, purchases of furniture and equipment, and other federal revenue.
- **E-Rate:** The [FCC's E-Rate Program](#) makes telecommunications and information services more affordable for schools and libraries. With funding from the [Universal Service Fund](#), E-Rate provides discounts for telecommunications, Internet access, and internal connections to eligible schools and libraries.

For libraries that are part of a library federation, there may be funding formulas determined at the local library level with how state and local funds are allocated and distributed. In addition, county library systems are provided with County Coordination Aid to implement county-wide library services, and these state funds are not part of a funding formula allocated to the libraries in the county library system.

Check with your library director, federated system administrator, or board president to learn about how your library is funded.

Resources:

How is Your Library Funded Section

- *Pennsylvania Code, Title 22, Part IX. State Library and Advisory Council On Library Development, §§131; 141.* Retrieved 2024, from www.pacodeandbulletin.gov/Display/pacode?file=/secure/pacode/data/022/partIXtoc.html&d=
- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93, Public Library Code, §§9301-9376.* Retrieved 2024, from www.legis.state.pa.us/WU01/LI/LI/CT/HTM/24/24.HTM
- *Pennsylvania Unconsolidated Statute, 1949 Act 14, Section 2328. State Aid for Fiscal Year 2024-2025.* Official Website of the Pennsylvania General Assembly. Retrieved 2025, from <https://www.palegis.us/statutes/unconsolidated/law-information/view-statute?SESSYR=1949&SESSIND=0&ACTNUM=14&SMTHLWIND=&CHPT=23&SCTN=28&SUBSCTN=>
- Bureau of Library Development - Office of Commonwealth Libraries. *State Aid Resources for Pennsylvania Public Libraries - State Aid Allocation*. LibGuides at the State Library of Pennsylvania. Retrieved 2024, from <https://pa.gov.libguides.com/stateaidresources/allocation>
- Commonwealth of Pennsylvania - State Library of Pennsylvania (2025). *Keystone Grants for Public Library Facilities*. Retrieved 2024, from <https://www.pa.gov/agencies/statelibrary/library-development/funding-support/keystone-grants-for-public-library-facilities.html>
- Federal Communications Commission (FCC) (2024). *E-Rate: Universal Service Program for Schools and Libraries*. Retrieved 2025, from <https://www.fcc.gov/consumers/guides/universal-service-program-schools-and-libraries-e-rate>
- Federal Communications Commission (FCC). *Universal Service Fund*. Retrieved 2025, from <https://www.fcc.gov/general/universal-service-fund>

- Institute of Museum and Library Services (IMLS). *Grants to States*. Retrieved 2025, from <https://www.ims.gov/find-funding/funding-opportunities/grants-to-states-overview>
- Institute of Museum and Library Services (IMLS). *Purpose & Priorities of LSTA*. Retrieved 2024, from <https://www.ims.gov/find-funding/funding-opportunities/grants-to-states/purpose-and-priorities-of-lsta>
- Pennsylvania Department of Community & Economic Development (2025). *Educational Improvement Tax Credit Program (EITC)*. Retrieved 2025, from <https://dced.pa.gov/programs/educational-improvement-tax-credit-program-eitc/>

Introduction to Governing the Library

Library boards play a vital role in supporting and guiding public libraries, ensuring they meet community needs effectively. Generally, there are two types of boards, governing and advisory. While both consist of dedicated volunteers who advocate for their library, their roles, responsibilities, and levels of authority differ. To better understand how your board functions and the impact you can have, it's important to learn about library governance, the roles of the board of trustees and your library director, and how board meetings, committees, and leadership roles help the library succeed. This section explains these responsibilities to help you feel more confident and ready to contribute in your role as a trustee.

Types of Boards

There are generally two types of boards, governing boards and advisory boards. While both act as volunteers and advocate for the library, their roles and responsibilities can differ. Here are a few general characteristics of each type:

Governing Boards:

- Act as public officers of the board.
- Are legally responsible for governing and financial oversight of the library.
- Are responsible for ensuring the library is operating in accordance with local, state, and federal laws.
- Provide oversight of the library for its organizational success and plan for its future.
- Supervise and evaluate the library director.
- Recruit, orient, and train new board trustees.
- Fundraise for the library and make a meaningful personal donation every year.

Advisory Boards:

- Are appointed by the governing entity of the library (borough, county, municipality, township, school district, etc.).
- Represent the community by advising the library director and library governing entity.
- Are willing to share their expertise and advice in support of the library director but may not be responsible for governing or making financial decisions for the library.
- Expand the library's network by promoting it in the community.
- Offer a personal annual donation.

Some advisory boards have more authority than others, depending on the local governing entity. When a board has more authority, it may be involved in decisions such as hiring and managing the library director, helping with the library's strategic planning for the future, approving library policies, and creating community engagement and advocacy plans.

Written agreements should be in place for this type of arrangement, such as a Memorandum of Understanding (MOU), between the governing entity and the board of trustees. An MOU is a written agreement between two or more groups or organizations that's not legally binding, but does lay out how the parties plan to work together and what they hope to achieve.

MOUs are helpful because they:

- Clearly explain what each party wants to accomplish and how they plan to work together
- Provide a structure or plan for the partnership
- Help everyone stay on the same page by setting clear expectations and promoting open communication

An MOU will establish the boundaries in place for all involved and assure that the advisory board operates properly.

Please note that the next tab that defines governance may or may not apply if you are part of an advisory board. To better understand how your board works, talk with your library director and board president about the type of board your library has and how it functions.

What's Governance?

The board of trustees of a public library is a governing board with legal responsibilities and the authority to make policy and govern operations under the [Public Library Code](#). Governance is the framework approved by the board of trustees to guide and oversee the library director and the library's operations. It involves creating policies, planning for the future, ensuring the facility is safe and accessible for the community, and approving the annual budget for the library. You shape the library's direction, ensure it serves the community effectively with the funds available, and guide the library to achieve amazing things for the community!

Governance differs and should be kept separate from managing the library's operations, which is the responsibility of the library director. The board of trustees provides the framework the library director will use to make certain the day-to-day operations of the library are carried out well.

It's important to have a library director you trust who works to support the board's vision. They, along with the staff, decide on programs, services, and how the library is organized and maintained. Your board's strategic plan guides these operational decisions and helps the library director achieve the library's goals.

Your library director should come to the board for advice and as a board trustee, you can provide that oversight and support. Your input is valuable and helps them make informed decisions about the library's resources, services, and staffing. The library's success depends on collaboration between the board of trustees and the library director.

Your library director and the library staff can't do the important work of meeting community needs without you! Good governance is a continuous process of oversight, learning, and listening - and when done right, it can help the library, staff, and community thrive.

Resources:

Board Governance Section

- BoardSource (2024). *Mentor Your Way to Board Development*. Retrieved 2024, from <https://boardsource.org/resources/mentor-to-board-development/> (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- Connecticut State Library (2024). *Best Practices in Connecticut Public Libraries - Governance*. LibGuides at Connecticut State Library. Retrieved 2024, from <https://libguides.ctstatelibrary.org/dld/bestpractices/governance>
- Georgia Institute of Technology (2025). *Memorandums of Understanding (MOU)*. Georgia Tech. Retrieved 2025, from <https://generalcounsel.gatech.edu/legal-affairs/memorandums-understanding-mous>
- Maine State Library (2021). *Chapter 5 - Types of Library Boards - Maine Library Trustee Handbook*. LibGuides at Maine State Library. Retrieved 2024, from <https://maine-msl.libguides.com/THB>
- State Library of Pennsylvania - Office of Commonwealth Libraries.
 - *Board Governance 101*. PA Library Staff Academy. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>
 - *Leadership By Design*. PA Library Staff Academy. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>

Duty of Care

Duty of Care: While you aren't expected to be an expert, you are expected to stay informed about the library's finances, legal matters, and operations. You are to actively participate in decision-making and use your best judgment for the library.

- **Stay Informed:** Make sure to read all the materials provided before meetings.
- **Attend Meetings:** It's important to be present at all meetings where decisions are made.
- **Exercise Independent Judgment:** Always act in the library's best interest, not based on personal connections or outside pressures.
- **Act in Reliance:** Trust the information you get from reliable and qualified sources to make decisions for the library.
- **Delegate Effectively:** Trust the library director to manage the day-to-day operations, while you focus on governance.

Examples:

The Good: Mary is a new trustee, and she gets a packet of information before her first board meeting. She takes time to go through the materials carefully, and writes down any questions she has. Before the board votes on a financial decision that affects the library, she's prepared and ready to ask the right questions.

The Questionable: Odin is a trustee at a library, and he has a friend who owns an HVAC business. The library needs a new HVAC system, and Odin doesn't mention his connection with the business before voting to approve his friend's company for the job.

Duty of Loyalty

Duty of Loyalty: You must always act in the best interest of the library, not for your own personal gain or advantage. The library's needs must come first.

- **Avoid Conflicts of Interest:** Disclose any situations where your personal interests might conflict with your role as a trustee.
- **Confidentiality:** Keep information about the library private unless it's already public knowledge or part of the public record.

Examples:

The Good: The library board is considering changing insurance providers, and one of the options is Jack's insurance business. Jack is a current board trustee and realizes this could be a conflict of interest, so he tells the board that he is a co-owner of the company and should not be part of the discussion. He leaves the room and doesn't participate in the talk or vote. After the vote, a board member calls him back into the room to continue the meeting.

The Questionable: Rachel, a library board trustee, is having dinner with a close friend who is a library director in the same federated system. During their conversation, Rachel mentions that the library director she supervises isn't doing a good job and should be fired.

Duty of Obedience

Duty of Obedience: You are responsible for ensuring the library is utilizing its resources when adhering to the library’s mission and operating in accordance with local, state, and federal laws and regulations.

- **Know the Law:** Make sure the library follows all local, state, and federal laws.
- **Comply with Governing Principles:** Follow the library’s bylaws and other governing documents.
- **Stay Focused on the Library’s Mission:** You need to know the library’s mission and stay true to it when making decisions for the library.

Examples:

The Good: Roger, a library trustee, is looking over the library’s State Aid Subsidy Application (SALSA) and notices the library isn’t fully meeting one of the required standards. He has a question about it and meets with the library director, who explains the standard, the application process, and how waivers work. With this new information, Roger better understands Pennsylvania’s library laws and comes up with some ideas on how the library might meet the standard next year. He plans to bring these ideas up at the next board meeting when the application and waiver is discussed.

The Questionable: The library's Finance Committee makes an important decision without first recommending their action to the full board. Leah, a trustee on the committee, knows the library's Bylaws outline that committees can't make major decisions on their own, but she doesn't speak up before the decision is made.

Resources:

Three Essential Duties Section

- BoardSource. *Board Member Roles and Responsibilities*. Retrieved 2024, from <https://boardsource.org/fundamental-topics-of-nonprofit-board-service/roles-responsibilities/> (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
- Nichols, Jerry, and Smith Aldrich, Rebekkah (2023). *Trustee Duties and Responsibilities - Handbook for Library Trustees of New York State*. New York State Library. Retrieved 2024, from <https://nyslibrary.libguides.com/Handbook-Library-Trustees/duties-responsibilities>
- State Library of Pennsylvania - Office of Commonwealth Libraries. *Leadership By Design - PA Library Staff Academy*. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>

Bylaws

Bylaws are a set of rules that guide how a library's board operates and how its trustees govern the library. **These rules are legally required for nonprofit organizations in Pennsylvania (15 Pa. C.S. §5310(a))** and should be reviewed and updated regularly as needed. Having the library's lawyer or solicitor review bylaws to make sure they are complete and follow the legal rules for the board's authority is a best practice.

Here are some best practices for including in the bylaws (a checklist can be found in the [Appendix - Sample Documents](#) section of the LibGuide):

- **Library Information:**
 - The name and address of the library.
 - The purpose of the board, including what the board is responsible for.
 - A statement about the difference between the board of trustee's duties and the library director's duties (part of the definition of a local library in [Title 22 of the Pennsylvania Library Code, Chapter 131.1 Definitions, Local Library](#)).
- **Board Structure:**
 - The number of trustees (members of the board).
 - How trustees are elected or appointed.
 - The length of time trustees serve and any limits on how long they can serve (terms and term limits).
 - The duties and responsibilities of trustees.
 - What happens if a trustee resigns or there's a vacancy.
 - How a trustee can be removed from the board.
- **Board Officers:**
 - Required officer positions.
 - How officers (Chair, Vice Chair, Treasurer, Secretary) are elected.
 - What each officer is responsible for.

- How long officers can serve in their role.
- Removal of officers from their position.
- **Requirement of a treasurer to be bonded (see [Title 24. PA. C.S. Education Pennsylvania Library Laws, §9318 Local Library Governance. \(e\) Bond](#)).**
- **Committees:**
 - List of the standing committees and their responsibilities.
 - The role of the Executive Committee, including what decisions and actions they can take between regular board meetings.
 - How ad hoc (temporary) committees are created.
 - Whether committees can include non-board members.
- **Board Meetings:**
 - Rules for conducting meetings (parliamentary procedure).
 - How often the board meets.
 - Attendance rules for trustees (including if meetings can be attended virtually).
 - Rules about public access to meetings depending on the organization (Sunshine Law, if applicable).
 - What's required for a meeting to be official (having a quorum to conduct business).
 - Procedures for holding special or emergency meetings.
 - Whether trustees can vote by email and/or virtually.
- **Governance, Oversight, and Fiscal Matters:**
 - What constitutes a conflict of interest, and the appropriate action if one exists.
 - How often bylaws are reviewed and updated.
 - The process for amending bylaws.
 - When the fiscal begins and ends each year.
 - Provision for annual audit or financial review.

- Non-compensation of trustees.
- Indemnification and insurance.
- What happens if the library is dissolved (organization and disposition of assets).

It's important to check with the library's legal counsel to make sure the library's bylaws comply with Pennsylvania law and meet the library's specific needs.

The [PA Library Staff Academy](#) includes a course on [bylaws](#). If you're looking for more of a deeper dive into this important and foundational document, access to the course is free with a registered account. Handouts from this course includes a sample of [bylaws for a Pennsylvania non-profit public library](#).

Additional Resources:

- BoardSource:
 - [Nonprofit Bylaws](#)
 - [Bylaws DOs and DON'Ts](#)
- PA Library Staff Academy, from *Board Deep Dive: Bylaws* course: [Sample Bylaws](#)

Trustee Job Description

The board creates a job description for their library director to clearly define the role and its responsibilities. The board of trustees should also consider having a job description for themselves to clarify their role and responsibilities in governing the library.

A job description that doubles as a board trustee agreement clarifies the roles and responsibilities of individual trustees and the entire board. [BoardSource](#), a leader in nonprofit board governance, highlights that this document sets clear expectations, reduces confusion, and prevents disengagement. It should outline both the board's collective duties and each trustee's individual responsibilities. Having trustees sign and date the document ensures they understand and acknowledge these expectations.

Some responsibilities of individual board trustees to include in a job description:

- **Know Your Library:** Understand the library's mission, the programs and services offered, and what areas of need exist for the library to continue its work of serving the community.
- **Know the Policies:** Follow and support the library's policies, especially those that apply to your role as a trustee.
- **Know the Law:** Follow and support all state, local and federal laws that impact the library.
- **Prepare for and Participate in Board Meetings:** Read all materials ahead of time, stay informed, and engage actively in meetings to support the board's work.
- **Value Everyone's Contributions:** Recognize that each board trustee brings unique skills and experiences that help support the library's success and its future.
- **Disclose Conflicts of Interest:** Annually sign off on the library's conflict of interest policy and openly address and potential or perceived conflicts when they arise.
- **Authority as Part of the Full Board:** As a board member, you have the authority to act only when the board is meeting or when authority is specifically given to you by the board.
- **Maintain Confidentiality:** Keep non-public information about the library private and do not share it outside of the organization.

- **Understand the Financials:** Review financial documents before meetings and ask questions to understand the library's financial position.
- **Be an Advocate and Ambassador:** Speak positively about the library's mission, represent the library as an advocate, and raise awareness of its needs in the community.
- **Seek Funding Opportunities:** Actively look for ways to raise money to support the library's mission, programs, services, and future.
- **Build Partnerships:** Explore opportunities for the library to partner with other community organizations to support the library's goals.
- **Leverage Your Connections:** Use your personal and professional networks to help the library achieve its mission.
- **Get Involved in Committee Work:** Join a board committee to support the library in a way that shares your skills and expertise.
- **Donate Personally:** Annually contribute a personal donation that is meaningful to you and to show your support for the library.
- **Protect the Community:** Every community member has the right to choose what they read, watch, or listen to. As a board trustee, it's important to put aside your personal preferences and opinions to protect this freedom for everyone.

Some responsibilities of the entire board to include in a trustee job description:

- **Mission Statement Development:** Create and follow the library's mission statement, ensuring it reflects the library's purpose in serving the community.
- **Ensuring Qualified Leadership of the Library:** Hire a competent library director to manage daily operations, support them, and evaluate their performance annually.
- **Upholding Legal and Ethical Integrity:** Understand and follow the legal requirements for public libraries, rely on the bylaws, and ensure that the duties of care, loyalty, and obedience are upheld by all board trustees when governing the library.
- **Governing Not Managing:** The role of the board of trustees is to govern the library, trusting the library director to effectively manage the staff and operations.
- **Strategic Planning:** Set the library's goals and make decisions based on its strategic plan. Monitor trends and measure the effectiveness of services and programs to ensure alignment with the plan.

- **Fiscal Responsibility and Oversight:** Prepare and track the library's budget, monitor financial reports, seek funding opportunities, and ensure the library's funds are wisely managed.
- **Advocacy and Public Support of the Library:** Meet with local officials, secure funding, support and be present for public relations efforts, advocate for the library's needs, and represent the library positively when in public.
- **Policy Development:** Create effective and enforceable policies that comply with laws and guide acceptable practices within the library.
- **Assessing Board Progress and Performance:** Regularly assess the board's impact on the library, identify strengths and areas of improvement through both individual and collective board evaluations.

This document should also explain how the library will support trustees in meeting their responsibilities. This can include providing necessary documents to help trustees in their work, working alongside them to achieve the library's goals in the strategic plan, offering learning opportunities to improve their skills, and maintaining clear communication so trustees stay informed.

A sample board trustee job description that doubles as a trustee agreement can be found in the [Appendix - Sample Documents](#) section of the manual.

Helpful Documents

Some documents that might be helpful in your role as a board trustee include the following, but not all of them may apply to your library:

Board Trustee-Focused:

- Board Trustee Agreement/Commitment to Serve
- Board Trustee Job Description
- Board Trustee Member List
- Board Committee List
- Prior board meeting minutes
- Listing of upcoming meeting dates
- Agenda for your next board meeting
- Conflict of Interest Policy and Attestation Statement

Organizational Documents:

- Articles of Incorporation
- Bylaws
- IRS Determination Letter (if a 501c3 organization)
- Recent Form 990 (if a 501c3 organization)
- Library Director Job Description
- Organization Chart of Roles/Staff

Financial Documents:

- Current Annual Budget
- Recent Profit & Loss Statement
- Recent Statement of Financial Income
- Recent Audit or Financial Review

Insurance Documents for Managing Risk: (this is a partial listing, please check with your insurance broker for policies that may apply to your library)

- Automobile Insurance
- [Bonding](#) of the Treasurer (§9318 Local Library Governance (e))
- Business Income Insurance
- Commercial Property Insurance
- Data Breach/Cybersecurity Insurance
- Director and Officer Liability Insurance
- Employment Practices Insurance
- Fire and Theft Insurance
- Flood Insurance
- General Liability Insurance
- Unemployment Insurance
- Volunteer Liability Insurance

Current and Future Planning Documents:

- Recent PA Public Library Data Survey (also known as the Annual Report)
- Current District Library Center Agreement
- Current Library Federation or Library System Member Agreement
- Current Strategic Plan

Policies (these to start, reading others will help):

- Board Meeting Attendance Policy
- Right to Know/Open Records Policy
- Personnel Policy Manual (including):
 - Conflict of Interest Policy
 - Record Retention Policy
 - Whistleblower Policy

- Workers' Compensation Policy
- Collection Development / Request for Consideration of Materials Policy
- Meeting Room Policy
- Internet Use Policies at the library (including the Children's Internet Protection Act)
- Confidentiality of Patron Records Policy
- Patron Privacy Policy
- ALA's Library Bill of Rights, Intellectual Freedom, Freedom to Read and Freedom to View statements.
- Photography Policy
- Customer Behavior Policy
- Public Comment Policy
- Social Media Policy

Community-Focused Documents:

- Annual Report to Funders
- Appeal Letters
- Communications to community and stakeholders
- Listing of upcoming important events, including major programs and fundraisers

Talk with your library director and board president about what documents above apply to your library and any other documents helpful for you.

Resources:

Foundational and Helpful Documents Section

- *Pennsylvania Code, Title 22, Part IX. State Library and Advisory Council On Library Development, §§131 - Definitions - Local Library.* Retrieved 2024, from www.pacodeandbulletin.gov/Display/pacode?file=/secure/pacode/data/022/partiXtoc.html&d=
- *Pennsylvania Consolidated Statute, Title 15, §5310(a).* Retrieved 2024, from <https://www.legis.state.pa.us/cfdocs/legis/LI/consCheck.cfm?txtType=HTML&title=15&div=0&chpt=53&sctn=10&subsctn=0>
- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93, Public Library Code, §9318 - Local Library Governance - (e) Bond.* Retrieved 2024, from www.legis.state.pa.us/WU01/LI/LI/CT/HTML/24/24.HTM
- BoardSource. (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
 - *Board Policy Checklist - Charter Boards.* Retrieved 2024, from <https://boardsource.org/resources/board-policies-checklist-charter-boards/>
 - *Nonprofit Bylaws.* Retrieved 2024, from <https://boardsource.org/resources/nonprofit-bylaws/>
 - *Sample Board Member Job Description Template.* Retrieved 2024, from <https://boardsource.org/resources/board-member-job-description/>
 - *Successful Board Self-Assessment.* Retrieved 2024, from <https://boardsource.org/resources/successful-board-self-assessment/>

- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- Garry, Joan. *A Template for a Great Board Orientation*. Joan Garry Consulting. Retrieved 2024, from <https://joangarry.com/board-orientation-template/>
- Ingram, Richard T. (2009). *Ten Basic Responsibilities of Nonprofit Boards*. (3rd ed., p. 30). BoardSource. <https://shop.boardsource.org/store/s/product/ten-basic-responsibilities-of-nonprofit-boards/01tQq000007RvHVIA0>
- Nichols, Jerry, & Smith Aldrich, Rebekkah. (2023). *Library Board Organization*. Handbook for Library Trustees of New York State. Retrieved 2024, from <https://nyslibrary.libguides.com/Handbook-Library-Trustees/board-organization>

Organization

A library's bylaws should clearly outline the responsibilities of its board trustees and board officers, including the board president, vice president, secretary, and treasurer. These officers are usually elected through a vote by board members during their annual meeting and serve in these roles for one year.

Governmental authorities (including boroughs, counties, municipalities, townships, school districts, etc.) may also appoint trustees to the library board. These appointed trustees should not bring political party interests into their work. Their main goal is to act in the best interests of the library.

While all board trustees may need to consider political factors that could affect the library, they should keep their decisions separate from personal politics.

By law, the library is required to:

- Elect at least a President, Secretary, and Treasurer from the current board members ([§9318. Local Library Governance. \(d\) Officers and Agents.](#))
- Ensure that the Treasurer is bonded (insured against fraud or theft) ([§9318. Local Library Governance. \(e\) Bond.](#))
- Submit an annual report to the organization that provides funding (usually a governmental entity) ([§9318. Local Library Governance. \(h\) Annual report.](#)).
- Send a copy of the annual report and required financial audit or review to the Office of Commonwealth Libraries ([§9318. Local Library Governance. \(h\) Annual report.](#))
- Make the accounts of the treasurer available for audit ([§9318. Local Library Governance. \(h\) Annual report.](#))
- Hold open meetings, except when executive sessions are necessary as noted in [Pennsylvania's Sunshine Act](#). Check with your library's legal counsel for clarification on the possible impact of PA's Sunshine Act for your library.

By law, trustees do not get paid for their work ([§9318. Local Library Governance. \(c\) Compensation.](#)), but they can be reimbursed for any necessary and reasonable expenses they incur while acting as a trustee.

All trustees are equal when it comes to making decisions and voting. The officers of the board are appointed to help make the board's work run more smoothly, but even they cannot speak on behalf of the entire board without permission. See the next section on *Officer Roles* for more details on the four main roles and responsibilities.

Officer Roles

The four main officer roles of a board of trustees include:

Board President: (also called Chair or Chairperson) The board president acts as the main link between the board of trustees and the library director. They are also someone the library director can look to for support, and keep the board updated on important issues the library is dealing with. Their responsibilities include:

- Leading all board meetings and working with the library director to create and share the meeting agenda and related materials ahead of time.
- Leading discussions during board meetings, encouraging trustees to participate, and ensuring that everyone is following the bylaws and library policies.
- Keeping board meetings on track, making sure the board uses their time efficiently and respects everyone's schedules.
- Maintaining respect and order during board meetings, ending discussions when needed, directing issues to the right committees, and delaying decisions until enough information is available.
- Signing official documents and representing the board in public, as directed by the board.
- Helping new trustees get oriented in their role, recruiting new board trustees, and reviewing the board's overall performance.
- Leading the hiring, evaluating, and termination processes of the library director.

Board Vice President: (also called Vice Chairperson) The board vice president steps in for the board president when they're absent and takes on any other tasks the board assigns. While this role isn't required by law, it's very helpful if the board president can't do their job temporarily.

Board Secretary: The secretary keeps accurate minutes of the board meetings and makes sure these minutes, along with the next meeting's agenda, are available to the full board on time. In some libraries, staff take minutes during board meetings and send them to the secretary to review, so the secretary can fully take part in discussions. After the minutes are approved by the board, the secretary stores a final copy in the board's records. The

secretary may also take on other tasks assigned by the board, and for some libraries, the role of the secretary and treasurer are combined.

Board Treasurer: The treasurer's role depends on the size of the library. In smaller libraries, the treasurer may handle financial records, bank deposits, financial reports, and pay bills. In larger libraries, the treasurer ensures that financial matters are properly managed. The library's bylaws should explain the specific duties of the treasurer, and the law requires the treasurer to be bonded (insured against fraud or theft) ([§9318. Local Library Governance. \(e\) Bond.](#)) Check with your board president and an insurance professional for guidance on bonding.

Expectations of the Board President

The role of the board president involves more than just overseeing meetings and the board of trustees. It requires balancing active listening, asking important and sometimes tough questions, and understanding where the library stands now and where it's headed. As board president, other trustees will look to you for guidance, so it's essential to know what's expected in this position.

If you're thinking about becoming the board president for your library, ask yourself these questions, based on advice from [Joan Garry, an expert in nonprofit leadership](#):

- **Are you interested?** This role needs someone who isn't reluctant about serving but is willing to step in and step up as a leader.
- **Do you believe in the library's mission?** Your passion for the library's goals will inspire others, especially fellow board members, to support the library's work in the community.
- **Do you get along with the library director?** The board president works closely with the library director, often for a two-year term. A strong working relationship with the director is essential for the role.
- **Is this the right time for you?** The board president position requires a significant time commitment. Make sure you can balance this with your personal and professional responsibilities.
- **Can you manage your time effectively?** There will be times when the library director needs your support. You should be able to make yourself available when necessary.
- **Are you diplomatic?** It's important to listen carefully to others, maintain respect, and handle difficult conversations thoughtfully with other trustees, your library director, and community members.
- **Can you ask tough questions?** The role requires you to ask important, sometimes difficult questions. You should be able to handle disagreements without getting defensive and work toward solutions.

- **Can you regularly meet with your library director?** You'll need to stay informed about what's happening at the library, discuss upcoming issues, and plan how to tackle them together.
- **Are you excited about raising funds and awareness for the library?** Board presidents play a big part in getting the community to stand up for and support the library. If you show enthusiasm for supporting the library financially, others will follow your lead.
- **Are you a good mentor?** Your library director will look to you for advice, support, and encouragement. Rising leaders within the board will look to you for guidance and knowledge about the history of the library, especially if they are committee chairs and want to effectively lead their team.
- **Do you appreciate the work of the library staff?** Recognizing and celebrating the accomplishments of library staff is important. Acknowledging their hard work can boost morale and encourage them.

Taking on the role of board president is a big responsibility, but it's also a rewarding way to help your library thrive. Consider these questions carefully to determine if you're ready for the challenge!

Additional Resources:

- BoardSource:
 - [How Board Chairs Foster Board Engagement](#) (6/3/2025)
 - [Mentor Your Way to Board Development](#) (6/14/2024)

Expectations of Trustees

Your role as a board trustee involves a variety of important activities. Here are some key expectations to help you succeed:

1. **Get Oriented:** Attend the orientation for new trustees. This gives you a solid foundation for your journey ahead.
2. **Know the Law:** Be familiar with local, state, and federal laws and guidelines affecting the library. Be diligent in upholding the legal expectations of duties of care, loyalty, and obedience to the library for yourself as a trustee and for your fellow trustees.
3. **Know Your Role:** Understand how your responsibilities differ from those of the library director.
4. **Commit Your Time:** Dedicate the necessary time to fulfill your duties effectively.
5. **Ask Questions:** Don't hesitate to ask your board president, fellow trustees, or your library director for clarification whenever needed.
6. **Value the Library's Role:** Recognize how your library serves as a trusted resource and partner in improving the lives in your community.
7. **Stay Informed:** Attend board meetings and other special meetings regularly to keep up with library developments.
8. **Be Prepared:** Review all meeting materials in advance so you can contribute meaningfully.
9. **Support Decisions:** Once a decision is made by the board, stand by it, even if you have reservations or if it was not your desired outcome.
10. **Collaborate:** Work well and develop healthy relationships with fellow trustees and your library director for the best outcomes.
11. **Avoid Conflicts of Interest:** Always put the library's interests first, leaving personal agendas aside when making decisions.
12. **Respect Confidentiality:** Keep sensitive library issues private, especially outside of meetings.

13. **Be Open-Minded:** Approach discussions with respect for differing viewpoints.
14. **Embrace Uniqueness:** Promote and create a culture of diversity, equity, belonging, and inclusion in your role.
15. **Share Your Skills:** Contribute your unique skills to library committees.
16. **Stay Updated:** Keep up with the latest trends and issues affecting libraries.
17. **Advocate:** Be a champion for the library among community members, other local organizations, and public officials.
18. **Support Staff:** Advocate for fair pay and benefits for library staff.
19. **Be Future-Focused:** Focus on securing a bright future for the library through strategic planning.
20. **Get Involved:** Participate in library programs, fundraisers, and other events to connect with the community.

By embracing these, you'll make a meaningful impact as a board trustee. Your engagement and commitment are vital to the success of your library and the community it serves!

Additional Resource: BoardSource's '[Six Essential Ingredients](#)' in effective governance (2016).

Resources:

Board Organization, Officer Roles, and Expectations Section

- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93, Public Library Code, §9318 - Local Library Governance*. Retrieved 2024, from www.legis.state.pa.us/WU01/LI/LI/CT/HTM/24/24.HTM
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- Garry, Joan (2017). *Joan Garry's Guide to Nonprofit Leadership* (1st ed., pp. 48-50). Wiley. <https://book.joangarry.com/>
- Ingram, Richard T. (2009). *Ten Basic Responsibilities of Nonprofit Boards*. (3rd ed., p. 30). BoardSource. <https://shop.boardsource.org/store/s/product/ten-basic-responsibilities-of-nonprofit-boards/01tQq000007RvHVIA0>
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- Nichols, Jerry, & Smith Aldrich, Rebekkah (2023). *Library Board Organization*. Handbook for Library Trustees of New York State. Retrieved 2024, from <https://nyslibrary.libguides.com/Handbook-Library-Trustees/board-organization>
- Office of Open Records (OOR). *Pennsylvania's Sunshine Act (Open Meetings Law)*. Retrieved 2024, from <https://www.openrecords.pa.gov/SunshineAct.cfm>

Importance

Regular **board meetings** are essential for the library to move forward in its service to the community, and for all trustees to be on the same page in decision-making. Effective board meetings are those that are thoughtfully planned, organized, and implemented.

Library board meetings follow the rules set in the board's bylaws. Parliamentary procedure is used to keep the meetings organized and help the group make decisions efficiently.

With parliamentary procedure, here's how decisions are made:

- Only one issue discussed at a time.
- Each person speaks one at a time.
- The board checks if there are enough members present (quorum) to make a decision.
- A board trustee makes a motion to propose an action.
- The entire board present votes on the proposal.

This process ensures everyone's voices are heard while also allowing the group to make decisions together.

Many boards use [Robert's Rules of Order](#) as a parliamentary procedure guide for running meetings because it provides a clear format. [BoardEffect](#) provides a helpful “cheat sheet” that can be used alongside the full Robert's Rules book. However, there are other resources that can also be used.

Additional Resources:

- BoardSource: [Board Meeting Effectiveness Assessment](#)

Preparing for a Meeting

Preparing for a library board meeting involves the following:

Agenda Development: The library director and board president work together to create the board meeting agenda to be sent along with the board packet at least 1-2 weeks prior to the meeting. Trustees can contact them if they want items added for discussion. The agenda should be filed as a written record along with the minutes approved by the board from the meeting.

Meetings for the Year: At the annual meeting, usually the year's board meeting dates are established and voted upon. It's crucial for trustees to plan to attend every meeting to ensure a quorum is established and decisions can be made.

Meeting Notification: At least 1-2 weeks before a board meeting, all trustees should receive a notice with the meeting date, time, location, any virtual attendance instructions, and the board packet that includes all necessary materials for the meeting.

Attendance: When you agree to serve as a library trustee, you are also making the commitment to regularly attend board meetings. If you can't attend an upcoming board meeting, let the library director and board president know in advance. Missing meetings can lead to a lack of understanding, wasted time and effort getting caught up, and difficulty in making informed decisions when voting in a meeting. Your library's bylaws may also set limits on how many meetings you can miss before facing possible removal from the board. If attending meetings regularly is a challenge for you, talk to your library director and board president. When all trustees are present and participating in the meeting, all points of view can be heard so that the best possible decisions are made for the library.

Board Meeting Preparation: It's important for you to be well-prepared for board meetings. Review all materials in your board packet, familiarize yourself with your committee's work, and come ready to participate in a productive meeting. If you have questions after reviewing the materials, ask your board president or library director. Remember that decisions should be made by the full board, not just through individual decisions.

Sunshine Laws

Some libraries in the Commonwealth are required to hold open and public meetings under **Pennsylvania's Sunshine Act**, [65 Pa. C.S. §§ 701-716](#). This law makes sure that board meetings are open to the public. It requires the library to give notice of the meeting in advance and allows non-board trustees to attend. During the meeting, the public can make comments during a designated comment period. The length of time for public comment is determined by the board of trustees. The Sunshine Act ensures the library is accountable and transparent to the community. Depending on how your library is structured, this may or may not apply. **Ask your library's legal counsel to determine if this applies to your library.**

The Agenda

Having a set **agenda** acts as a guide for the meeting, keeps discussions on the topics presented, and ensures that everyone's time is used effectively and productively. The agenda should focus on important policy and strategic decision-making. Often, boards will use a consent agenda to help create a more focused and efficient meeting.

How to Use a Consent Agenda: A consent agenda groups routine items together that don't require a discussion, allowing the board to focus on major discussions and actions within the agenda. If your board uses a consent agenda, it's important that everyone understands how it works. More information on the benefits of a consent agenda can be found on [BoardSource's helpful website](#).

A consent agenda during a meeting involves:

- Introducing the consent agenda.
- Removing any items (if requested) and then approving the consent agenda.
- Documenting the approval of the consent agenda.

Common Items on the Consent Agenda:

- Minutes from the previous meeting.
- Confirming any decisions made in the prior meeting.
- Reports from the library director, board president, and treasurer.
- Committee reports that don't require a discussion or a vote.
- Informational materials, updates to regularly used documents, and routine correspondence.

Board meeting time is valuable. It's the time you set aside to review, prioritize, and plan as a group. A consent agenda used in a meeting helps streamline the meeting to focus on the topics and issues that matter the most. Topics that need dedicated discussion should not be included in a consent agenda.

Quorum, Conflict of Interest, and Voting

A **quorum** is the minimum number of board trustees needed to be present at a meeting to make decisions and conduct legal business. If there's no quorum, the board president should end the meeting and reschedule it.

Important Considerations About a Quorum:

- The number required for a quorum should be clearly defined in the library's bylaws.
- To determine the quorum number, refer to [Section §5756.0 of Title 15 of Corporations and Unincorporated Associations](#): “**(a) General rule.** -- A meeting of members of a nonprofit corporation duly called shall not be organized for the transaction of business unless a quorum is present... (1) A quorum for the purposes of consideration and action on a particular matter at a meeting shall consist of: (i) the presence of members entitled to cast at least a majority of the votes that all members are entitled to cast on the matter.”

[BoardSource](#) defines a **conflict of interest** existing if “a member of the nonprofit board has a personal interest that may influence them when making decisions.” If a trustee has a conflict of interest on an issue, it should be disclosed in a way that aligns with the library's conflict of interest policy. If required by the board, the board trustee should leave the meeting during the discussion and return once the topic is finished. This allows the board to discuss the issue openly and avoid any uncomfortable or inappropriate situations. Having a conflict of interest policy in place as well as annual signed attestation statements by each board trustee helps the board handle conflicts when they arise and provides a clear process to follow.

As a board trustee, **voting** is your individual decision. You make this choice based on the information available to you to decide what is best for the library. It's important to be well-informed about any issue you vote on so you can make the best decision. Once a decision is made, the board should speak as a group with one voice and publicly support the decision that was agreed upon.

Meeting Topics

Topics in the agenda for discussion can include:

Committee Work: Committees should share their recommendations with the full board for a vote. The chair of each committee should include a report in the board meeting packet before the meeting and can give updates or additional information during the meeting if needed. Any committee recommendations that require action should be voted on by the full board during the meeting.

Planning for the Future: At each board meeting, time should be set dedicated to planning for the future and checking progress against the library’s strategic plan. Setting clear goals and objectives helps guide the library’s director, and evaluating progress is an important part of this planning process.

Learning Opportunities: It’s important for you as a board trustee to keep learning so you can be as effective as possible in your role. Here are some ways to add learning to a board meeting:

- **Review of library programs and services:** Set aside time to review the library’s current programs and services so everyone knows what’s happening and how the library serves its community.
- **Exploring board trustees’ strengths:** Use time to discuss the skills and experiences of board trustees to discover strengths and new opportunities.
- **Learning from the trustee manual:** Take time to discuss topics from this manual to reflect on how to apply these ideas and concepts in your work.
- **Discussing library trends:** Talk about the latest trends in libraries and how they might affect your library, along with any updates from your district library center and the Office of Commonwealth Libraries.

Executive Sessions

An **executive session** is part of a board meeting that is not open to the public. These sessions are typically used for sensitive or confidential topics, such as evaluating the library director, handling staff grievances, discussing staff pay, trustee nominations, or business negotiations. They allow the board members to have open and private discussions related to the library. A motion is made to enter into an executive session, and the time is noted in the minutes when it begins and ends. Minutes are not kept of these sessions, and any decisions to be made as a result of these sessions are brought back into the public meeting for a full board vote. Executive sessions can also be scheduled at a later time. Check with your legal counsel if you have questions regarding how and when to use executive sessions during meetings of the board.

Meeting Minutes

Minutes are the written records of what happens during a board meeting. Clear minutes help show the board is following its duty of care responsibility and that the board has done its job properly. Well-written minutes provide proof the meeting was officially called, that proper parliamentary rules were followed, and the agenda was completed. They do not need to be a word-for-word description of the meeting but rather a clear overview.

For nonprofits, minutes are required by law ([15 Pa. C.S. §5508\(a\)](#)) and for the [Form 990](#) which asks if meetings are documented at the time they happen. Minutes include records of motions, who made them, the votes, and the results. They can also summarize any discussions on issues and as a best practice, can be structured to reflect the meeting agenda.

The key details minutes should include (based on [BoardSource's listing](#)):

- Name of the library.
- Date and starting time of the meeting.
- List of board members who attended, those excused, and those absent.
- Whether a quorum was present to conduct business.
- Details of motions made, who made them, and the voting results, including names of any members who abstained or disagreed.
- Reports from library director, board president, and committees, along with any documents shared.
- Plans for future actions.
- Optional: A summary of any debates on issues.
- If an executive session was held, the time the board started and ended the session.
- Old and new business discussed.
- Time the meeting ended.
- Name of the secretary and the date the minutes were written.

The board decides how the minutes are shared with people other than board trustees. Once the minutes are given to and approved by the board of trustees, they must be made available for the public to view.

Annual Meeting

An **annual meeting** is a special meeting held once a year. It usually includes a review of the board's bylaws and board policies, electing new board officers and new trustees, reviewing the past year's activities, and highlighting goals for the upcoming year. This meeting may also include approving the next year's board meeting schedule.

Resources:

Board Meetings Section

- *Pennsylvania Consolidated Statute, Title 15, Corporations and Unincorporated Associations, §5756.0.* Retrieved 2024, from <https://www.legis.state.pa.us/cfdocs/legis/LI/consCheck.cfm?txtType=HTM&title=15&div=0&chpt=53&sctn=10&subsctn=0>
- *Pennsylvania Consolidated Statute, Title 65, Public Officers, §§ 701-716.* Retrieved 2024, from <https://www.legis.state.pa.us/cfdocs/legis/LI/consCheck.cfm?txtType=HTM&title=65&div=0&chpt=7>
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- Mathias, Christine (2025). *Requirements for Nonprofit Annual Meetings*. NOLO. Retrieved 2025, from <https://www.nolo.com/legal-encyclopedia/requirements-for-nonprofit-annual-meetings.html#:~:text=Even%20if%20your%20organization%20has%20regular%20meetings%2C%20your,the%20upcoming%20year%2C%20and%206%20reviewing%20nonprofit%20policies.>
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 - *Library Board Meetings- Handbook for Library Trustees of New York State*. New York State Library. Retrieved 2024, from <https://nyslibrary.libguides.com/Handbook-Library-Trustees/board-meetings>
 - *Orientation of New Trustees - Handbook for Library Trustees of New York State*. New York State Library. Retrieved 2024, from <https://nyslibrary.libguides.com/Handbook-Library-Trustees/orientation>
- Office of Open Records (OOR). *Pennsylvania's Sunshine Act (Open Meetings Law)*. Retrieved 2024, from <https://www.openrecords.pa.gov/SunshineAct.cfm>
- Robert, H. M., III, Honemann, D. H., Balch, T. J., Seabold, D. E., & Gerber, S. (2020). *Robert's Rules of Order Newly Revised in Brief* (3rd ed.). PublicAffairs. Retrieved 2024, from <https://robertsrules.com/books/newly-revised-3rd-in-brief-edition/>
- State Library of Pennsylvania - Office of Commonwealth Libraries. *Leadership By Design - PA Library Staff Academy*. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>

Importance

Some tasks, like approving the library's budget and advocacy, should be handled by the full board, while others can be assigned to committees. Committees focus on specific issues, provide recommendations, and report back to the full board. They don't make decisions on behalf of the entire board but play a key advisory role in moving the library forward. [BoardSource](#), a leading authority on nonprofit governance, suggests forming standing committees for ongoing activities. Board members may join committees based on their expertise.

Bylaws should define committee roles, and reports should be shared with the board in advance of full board meetings. Since committee meetings may come under Pennsylvania's [Sunshine Act](#), it's important to follow any legal requirements for calling and posting these meetings.

Committees help the board focus on important issues, divide the workload, and prevent the full board from being overwhelmed. Using committees for specific issues saves time and makes the best use of each trustee's skills.

Examples

Some of the most common standing committees include:

- **Executive Committee:** Chaired by the board president and often made up of board officers, this committee may handle urgent decisions between meetings and can oversee the library director's evaluation process. Please refer to your library's bylaws to determine what actions and decisions your executive committee can take in between regular board meetings.
- **Governance Committee:** This committee ensures the board functions well, meets the library's needs, and helps the board fulfill its due diligence. It focuses on board diversity to be sure it has a variety of demographics, skills, knowledge, and experiences among its members. It organizes orientations for new trustees, provides avenues of ongoing education for trustees, conducts board assessments, and nominates new trustees. This committee also looks the current compliment of members for future officer leadership.
- **Finance Committee:** This committee is responsible for creating the budget with the library director, developing finance policies, and overseeing the library's finances to report back to the full board. They report financial issues to the board, ensuring transparency and clarity. A helpful chair for this committee would be one with financial expertise.
- **Audit Committee:** This committee manages the library's annual audit process, selects the auditor, reviews the audit report, and ensures compliance with financial reporting rules and laws. A member with accounting experience is a helpful chair for this committee.
- **Fundraising or Development Committee:** This committee works with the library director to create fundraising plans, engages the board in fundraising activities, and leads events and campaigns to raise money for the library.
- **Personnel Committee:** This committee focuses on human resources, including managing the process of hiring or terminating a library director. They also guide the process of evaluating the library director, ensuring personnel policies are in place that meet legal requirements and are enforceable, and addresses any personnel issues brought by the library director in their management of library staff.

This isn't a complete list of all possible board committees. The types of committees a library has depends greatly on its specific needs. Talk to your library director or board president to learn about the current committees at your library, and review the library's bylaws to understand how they function.

Considerations

When considering committees, think about the library's mission and what areas need focus. For example:

- **Strategic Planning Committee:** How often does the board update the library's strategic plan and check progress? This committee could focus on the plan's activities and report to the board each month.
- **Policy Committee:** Are there policies that need to be reviewed annually, or is the library in the process of creating a policy manual? A policy committee could handle these tasks and bring newly created and updated policies to the full board for approval.
- **Facilities Committee:** Does your library have a facilities plan, and how often are improvements or updates made to the facility? This committee could ensure the library stays up to date with maintenance and needed services throughout the year and can plan for future building projects.

Committees should develop working charters that outline the intent and purpose of the committee, as well as the goals they will meet. Chairs of these committees should be voted upon at the board's annual meeting each year.

Committees are also a great way to develop leaders within the board of trustees. They provide an opportunity for board members to take on more responsibility. A committee chair who shows commitment and effectiveness in their leadership could be considered for a board officer role. Committees can also include people who are not trustees, and this can help in the board's recruitment of new trustees to the board. Check your library's bylaws for information on committee membership.

For activities that aren't frequent enough to require a full committee, task forces or advisory groups are a good option. These temporary groups can focus on specific, time-limited tasks and work more efficiently. Their work and any recommendations can be reported back to the full board. Task forces and advisory groups can also include community members who aren't on the board, bringing in fresh perspectives and possibly future board trustees!

As the library's and community's needs change, committees, task forces, and advisory groups should adapt as well. Check with your library director, board president, and district

consultant librarian on best practices for committees, task forces, and advisory groups and what local decisions are in effect for your library.

Resources:

Board Committees Section

- *Pennsylvania Consolidated Statute, Title 65, Public Offices, §§ 701-716.* Retrieved 2025, from <https://www.legis.state.pa.us/cfdocs/legis/LI/consCheck.cfm?txtType=HTM&title=65&div=0&chpt=7>
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Introduction to Board Trustee Responsibilities

As a board trustee, you play a crucial role in the overall health and success of your library. This section covers some of the most important responsibilities you will have, including managing and supporting your library director, hiring new leadership when needed, and planning for smooth leadership transitions. You'll learn about the value of strategic planning in setting your library's future direction, developing policies that guide operations and support your community, and overseeing the library's budget and finances. This section also covers the importance of understanding revenue sources and raising funds is vital to sustaining the library's services. Additionally, this section highlights your role in media and communications, advocacy efforts, and building a strong, effective board through recruitment and regular self-assessment. All of these responsibilities ensure your library remains a vibrant, well-supported resource for your community.

Relationship Building: Library Director and Board

The relationship between the library director and the board of trustees is crucial to the library's success. When they work well together, with mutual respect, the library can provide better services to the community. However, if there's a lack of communication or teamwork, it can hurt the library and its services to the community.

Joan Garry, a nonprofit expert, compares the library director and board of trustee relationship to a “twin-engine jet.” Just like a jet needs both engines to work together simultaneously, the library director and the board of trustees must share leadership and responsibilities. The library director manages the library and staff, while the board oversees the governance of the organization and provides guidance. When both sides are working in sync, the library can move forward effectively.

It's important for the board to find the right balance in its role. Getting too involved can lead to micromanaging the library director and library, which isn't helpful for anyone. After all, you've hired the library director to lead, so it's important to trust them to move the library forward. On the other hand, staying too distant can lead to the board missing out on important decisions and the library losing its direction. The board needs to be actively engaged, without overstepping, to help the library stay on track and thrive in the community.

Relationship Building: Library Director and Board President

In her book, [*Joan Garry's Guide to Nonprofit Leadership*](#), Joan points out that one of the key signs of a healthy nonprofit organization is the relationship between the director and board president. The library director and board president lead separate groups that are crucial to the library's success. **The library director manages the library and staff, while the board president guides the trustees in overseeing the governance of the organization.**

When the relationship between the library director and board president is strong – built on trust, respect, and a willingness to work together – it leads to clear roles and a shared vision for the library. Both leaders understand where their responsibilities begin and end, and how they can support each other. BoardSource offers a helpful [guide](#) that shows what a successful partnership between the library director and board president looks like.

On the other hand, if the relationship is weak, it can lead to a lack of trust, poor communication, and confusion about everyone's roles and expectations. This can negatively affect both the library director, the staff, the board, and ultimately the library's work in the community.

Both the library director and board president bring different skills and experiences to their roles. They should both be passionate about the library's mission and committed to making the library successful now and into the future.

For more details about these roles and how they should be different, refer to the sections in the manual about [Learning About Your Library](#) and [Governing the Library](#).

Managing and Supporting

It's critical for the board to offer consistent, reliable, and supportive guidance to the library director as they manage the library's day-to-day operations. You as a trustee should be involved without micromanaging, allowing your library director to develop their skills and expertise in leading the library. Here's how you can help foster a positive relationship, build trust, and support your library director's success:

- **Be Predictable:** Your library director should feel confident in their understanding of how the board will react to challenges. If they can predict your response, it makes problem-solving easier for both sides.
- **Be Encouraging:** Your library director faces tough decisions daily. Offering encouragement helps them stay motivated and can make seemingly impossible situations manageable.
- **Be a United Front:** When decisions are made, especially when the library's stakeholders or community aren't immediately supportive, it's important to be supportive of your library director. Having your backing during difficult times can strengthen your relationship.
- **Be Available:** Your library director should feel comfortable coming to you for help when needed. Being available to offer support in tough situations shows that you're there to help them succeed.
- **Express Your Gratitude:** Never underestimate the power of appreciation. Regularly thanking your library director for their hard work or problem-solving boosts their morale and confidence.

Additionally, supporting your library director's ownership of their role helps foster growth. Here's how you as a trustee can encourage this sense of ownership:

- **Autonomy:** Trust your library director's abilities to manage the library independently. Their insights, based on their experience and knowledge of library trends, should be valued in decision-making processes. Encourage them to speak up when they have concerns.
- **Mastery of Leadership Skills:** Support your library director's development by encouraging them to pursue opportunities that help them improve their leadership

skills. If they identify growth opportunities, consider how you can support their learning.

- **Sense of Purpose:** Help your library director maintain a clear sense of purpose. This ensures they are leading with vision, managing the library well, and ensuring it is an integral part of the community.
- **Clear Roles and Goals:** Provide well-defined goals and objectives to your library director that are aligned with the library's strategic plan. This clarity allows them to perform effectively without second-guessing the direction they should take.

By offering consistent support and fostering a sense of ownership, you as a trustee can help your library director thrive in their role and lead the library in fulfilling its mission.

Evaluating

Evaluating the performance of your library director is a tough but essential task for a board of trustees. This process needs to be meaningful, thorough, and not rushed. A good evaluation is timely, thoughtful, and inclusive of your library director's work over the past year. It should also encourage and support your library director, motivating them to keep up the good work and to address any performance issues in the next year.

There's no one-size-fits-all approach to this evaluation, but it should happen annually, ideally around your library director's work anniversary. The process should be clear, consistent, and agreed upon by both the board of trustees and your library director.

Here are some things to consider when designing an evaluation:

- **Job Description:** Review your library director's job description. Does it still reflect their role and the library's needs?
- **Library's Mission and Goals:** Think about the purpose, current plans, and future of the library. Does your library director's work align with these?
- **Last Year's Goals:** Look at the goals from the previous year's evaluation. Has your library director made progress? What new goals should be set for the upcoming year? Both the board of trustees and your library director should agree on these goals.
- **Library Director's Impact in Meetings:** Consider how well your library director communicates library operations during meetings. Do you have the information you need to confidently make decisions for the library?
- **Community Relations:** Think about how your library director interacts with the community. Are they strengthening relationships with partners and demonstrating the value of the library?
- **Programs and Services:** The library's services should meet community needs. Is your library director making sure these services are appropriate and effective in doing so?
- **Budget and Records:** The library director should manage the library's budget and financial records properly. Are they clear, transparent, and well-managed?

- **Staff Relations:** It can be helpful to gather feedback from staff members about how your library director manages the team. Are they handling administrative matters well?
- **Salary and Benefits:** Review your library director's compensation and benefits. Is it competitive, appropriate, and tied to their performance?
- **Trustee Feedback:** All board trustees should have the opportunity to provide confidential and anonymous feedback on your library director's performance, including areas of strength and where improvement can be made.
- **Self-Assessment:** Does your library director have a chance to reflect on their own performance? They should be given the opportunity to assess their work, achievements, and areas of improvement.

A key principle to follow is a 'no surprises' approach when it comes to feedback. As a board trustee, you should be providing ongoing, constructive feedback throughout the year, now just during an annual performance evaluation. Your library director would much rather have clear and consistent communication, commendation for their good work, with guidance and support along the way, instead of a once-a-year conversation during their evaluation.

For additional support in the performance evaluation process, your district consultant can be a helpful resource for you to provide best practices. Additionally, you can find samples of a performance evaluation as well as a self-assessment in the [Supplemental Documents](#) section of this LibGuide.

Remember, as a board of trustees, your role is to evaluate the performance of your library director only. Your library director is responsible for reviewing the performance of the rest of the library staff.

Resources:

Your Library Director Section

- BoardSource. (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
 - *Board Chair & Chief Executive Partnerships* (2023). Retrieved 2025, from <https://boardsource.org/board-chair-chief-executive-partnership/>
 - *Executive Evaluation and Compensation* (2025). Retrieved 2025, from <https://boardsource.org/fundamental-topics-of-nonprofit-board-service/executive-evaluation-compensation/>
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
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What's Succession Planning?

Succession planning is simply preparing ahead for the time when your library director leaves, whether that be through retirement, moving on to a new opportunity, or needing to step down for other reasons.

The goal is to have a plan in place before that happens, so that the board isn't caught off guard. This gives the board enough time to manage the transition smoothly and find the right person to lead the library.

The [Social Security Administration](#) puts it in this way: succession planning helps reduce the impact of losing key people in an organization.

Nonprofit expert Joan Garry says leadership transitions are one of the most disruptive things a nonprofit can go through. Without a plan, the library can quickly become unstable or lose momentum. But with a solid succession plan, the board can keep the library steady and focused during the change.

Even though it takes some effort to put together a good plan, it can save the board time, stress, and money when the time for a leadership change comes.

When There's No Time to Plan

If the board needs to find a new library director and there's no succession plan in place, strong leadership from the board becomes even more important to guide the library through the transition.

If there's a gap between when the current library director leaves and the new library director starts, the board should appoint a qualified interim or acting library director. This step ensures the library continues running smoothly, helps ease staff concerns, and provides stability until the new permanent director is hired.

It's important to note that board trustees should not serve as interim library director unless they resign from the board and are qualified for the role. Also, the board should not take on day-to-day management of the library. **The board's role is oversight, not management.** For more details on the difference, refer to the [Responsibilities Chart](#) outlining the board's duties versus the director's duties.

Preparing

When it's time to hire a new library director, here are some best practices:

- **Appoint a Hiring Committee:** This group will manage the hiring process.
- **Review the Job Description:** Meet with the outgoing library director to go over the current job description. If the role has changed, update the description before posting the job.
- **Align with the Library's Strategic Plan:** Look at the library's goals and progress made to ensure the new library director will help continue and build on the plan.
- **Decide on Search Assistance:** Choose whether the board will handle the search on its own or hire an external search firm to assist.
- **Ensure Fair Compensation:** Check that the salary and benefits are competitive with similar libraries and current trends. A strong leader should be fairly compensated.
- **Communicate with the Community:** Announce the outgoing library director's departure, thanking them for their leadership and highlighting their achievements.
- **Create Interview Questions:** Develop standard questions to ask all candidates. Have the library's legal counsel review them to ensure they follow employment laws.
- **Reference Checks:** Prepare questions for reference checks to get a complete view of the candidates. Again, ensure the questions are legally reviewed.

Considerations

When hiring a new library director, it's important to think about the kind of leader your library needs and how that fits with the library's mission, plans, and the community's needs. Here are some helpful questions to guide the process:

1. What qualities do you value in the current library director?
2. What skills are most important for the new library director to succeed?
3. How should the library director interact with the board, staff, and community?
4. What challenges and opportunities do the library face in its strategic plan?
5. Does the library need a seasoned, experienced library director, or would you consider a newer professional in the field?
6. Would you prefer a library director who is local, or are you open to candidates from outside the community?
7. Is there a great candidate already working within the library who could take on the role?

Characteristics

Key Qualities of a Successful Library Director

Hiring the right library director is one of the most important responsibilities of the board. Your director should be a strong leader who can effectively manage the library and support the community. Here are some key qualities to look for:

1. **Library Knowledge:** A deep understanding of how libraries operate and the ability to think critically about improving them.
2. **Independent Judgment:** The ability to make decisions and work independently.
3. **Proactive:** A strong drive to take initiative and tackle challenges or opportunities.
4. **Knowledge of Best Practices:** Understanding current trends and best practices in libraries and the community.
5. **Tech-Savvy:** Familiarity with the latest library technologies and a willingness to continue learning.
6. **Knowledge of Library Resources:** Well-versed in the library's resources and services.
7. **Program Development:** Creativity in planning and implementing effective library programs and services.
8. **Community Engagement:** Actively involved in the community, understanding its needs and aspirations.
9. **Strong Communication Skills:** Ability to speak and write well, especially when reporting on the library's operations and impact.
10. **Management Skills:** Capable of making decisions, implementing policies, and managing library staff effectively.
11. **Relationship Building:** Developing strong partnerships and maintaining relationships with library supporters.
12. **Vision Alignment:** A clear vision that matches the library's goals.

Additional Areas of Knowledge or a Willingness to Learn:

The most recent version of this manual can be found on the [Public Library Operations and Board Governance LibGuide](#) of the Bureau of Library Development (BLD).

1. **Finance:** Ability to understand financial statements and make informed decisions about the library's budget.
2. **Advocacy:** Able to speak with community leaders, funders, and legislators about the importance of the library and its funding.
3. **Strategic Planning:** Skill in analyzing the library's current situation and planning for its future.
4. **Marketing and Public Relations:** Ability to effectively communicate the library's services and programs to the community.
5. **Team Management:** Leading and supporting library staff to achieve their goals.
6. **Community Awareness:** Understanding the community's needs and designing services that meet those needs.

Advertising

To find the best candidate for the library director role, it's important to advertise the position in the right places and at the right time. This helps ensure a smooth transition and keeps services running without disruption for the community, staff, and board. Consider how your community receives information and where you can post job openings both locally and beyond. Here are some ideas:

- **Local newspapers** (both print and online)
- **Community centers or local organizations** that have a connection with the library
- **Social media** platforms the library uses to share updates
- **State and national library associations** (like PaLA and ALA)
- **State listservs** that share library job opportunities
- **Job search websites** like Indeed or LinkedIn

By using a mix of these methods, you can reach a wide pool of qualified candidates for the position.

Sample Interview Questions

The following are some sample interview questions to consider incorporating into your own set of questions when hiring a new library director. They focus on leadership, community engagement, strategic vision, and the challenges a library director may face.

Leadership & Management

1. What do you consider to be the most important qualities of a successful library director?
2. How do you approach managing a diverse staff with varying skill sets and experiences?
3. Can you provide an example of a difficult leadership decision you've had to make and how you handled it?
4. What strategies do you use to ensure staff development, retention, and motivation?
5. How do you foster a positive work culture within the library?
6. How do you engage with and support your library staff to help them develop their skills?
7. How do you ensure that the library's mission stays central to the organization's activities and decision-making?

Vision & Strategy

1. What is your vision for the library's growth over the next 5 to 10 years?
2. What trends do you see impacting the library field?
3. How do you stay updated on new technologies, trends, and best practices in the library field?
4. What role do you see the library playing in the community's educational landscape?
5. How do you envision expanding library services to meet the changing needs of the community?
6. How do you balance innovation with maintaining the library's core services and functions?

Community Engagement

1. How do you involve the local community in library programming and decision-making?
2. What steps have you taken or would you take to engage underserved populations in library services?
3. How do you assess community needs, and how do those assessments influence library services and programming?
4. Can you share an example of a successful partnership you've formed with local organizations or schools?
5. How do you advocate for the library's role within the broader municipal government or local officials?

Budget & Resources

1. How do you prioritize funding and allocate resources when managing a library's budget?
2. Have you had experience securing grants or other forms of funding for library projects? Can you share an example?
3. What are the biggest financial challenges you've encountered in library management, and how did you address them?
4. How do you make decisions when resources are limited and there are competing priorities?
5. How do you measure the return on investment (ROI) for library programs and services?

Technology & Innovation

1. What is your approach to integrating new technologies into library services, and how do you ensure they are accessible to all patrons?
2. How do you see the role of digital resources, such as e-books, online databases, and virtual programs, in the future of libraries?
3. What steps do you take to ensure the library's infrastructure supports both physical and digital needs?

4. How do you balance maintaining physical collections with the increasing demand for digital content?
5. What are your thoughts on library services in the age of artificial intelligence (AI) and automation?

Challenges & Opportunities

1. What do you see as the biggest challenges facing libraries in the next few years, and how would you prepare for them?
2. How do you approach conflict resolution, either among staff or with patrons?
3. What's your strategy for maintaining library relevance in the digital age?
4. How do you deal with the changing role of libraries as physical spaces in an increasingly digital world?
5. How do you manage balancing traditional library services with evolving needs and trends, such as co-working spaces or community hubs?

Performance & Impact

1. How do you measure the success of library programs and services?
2. Can you share an example of a program or initiative you implemented that had a significant positive impact on the community?
3. How do you foster a culture of continuous improvement within the library?
4. What are the metrics you use to evaluate the library's performance?
5. How do you approach feedback from patrons, and how does it influence library policies or services?

Time Management

1. How do you balance administrative tasks with providing leadership and support to your staff?
2. Can you give an example of a time when you had to handle competing priorities or deadlines? How did you manage this?
3. What strategies do you use to ensure the library runs smoothly on a day-to-day basis while also focusing on long-term goals?

4. How do you delegate tasks and ensure that important projects are completed on time?
5. What tools or systems do you use to manage your time and workload effectively?

Skills and Experiences

1. In your opinion, what are the most essential skills for a library director to have? How do you actively work on developing and refining these skills?
2. What is some of the most constructive feedback you've received throughout your career, and how did it influence your approach to your work?
3. Can you share a specific challenge you faced as a library director and how you overcame it?
4. What's been your most rewarding experience working in a library, and how did it shape your approach to leadership?
5. Have you ever had to make a tough decision that impacted library services? How did you handle it?
6. Can you tell us about a recent new skill you've learned and how you went about acquiring it?
7. What motivates you to work in the library field, and how do you stay motivated through challenges?
8. What interested you in this position, and how do you see your values aligning with the library's mission and vision?

Questions like these can help you gauge the candidate's leadership style, their approach to community engagement, their ability to manage resources, and their vision for the future of the library. They also provide insight into how the director might navigate the challenges and opportunities facing modern public libraries.

These sample questions are also available in PDF and Microsoft Word versions in the *Sample Documents* section of the [Appendix](#) of this LibGuide.

Hiring and Supporting

Once you hire a new library director, it's important to actively support them as they settle into their role. Leaving them to “figure it out” on their own can lead to problems that could have been avoided with the right guidance. While you've hired the right person for the job, they still need help getting started.

Similar to how you were oriented as a new trustee, your new library director will need important information and onboarding to set them up for success. Here are some considerations to keep in mind:

- **Clear Roles and Responsibilities:** Make sure both you and the library director understand their role and responsibility as well as the board's, how they may overlap, and how they work together.
- **Give Time to Learn:** Allow your new library director time to understand the library, staff, and community. They need to listen, build relationships, and grasp the library's challenges and opportunities.
- **Set Clear Expectations:** Be clear about what you expect from your library director and provide regular feedback to guide them.
- **Regular Meetings:** The board president should meet with your library director weekly until both are comfortable with a meeting schedule that works.
- **Be Supportive and Patient:** Transitions can be tricky. Both the board and your library director will face challenges. Be consistent, predictable, and understanding. It takes time to see how well your new library director will succeed in the role.

See the [Sample Documents - Appendix](#) section of the LibGuide for an example of an onboarding checklist.

Resources:

Your Library Director - Succession Planning and Hiring Section

- American Library Association (ALA). *What Library Directors Need to Know*. Retrieved 2025, from <https://www.ala.org/educationcareers/careers/librarycareerssite/whatyouneeddirector>
- BoardSource. *Executive Transition and Succession Planning*. Retrieved 2025, from <https://boardsource.org/fundamental-topics-of-nonprofit-board-service/executive-transition/> (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
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- Social Security Administration. *How to Implement Succession Planning - Section 218 Training*. Retrieved 2025, from https://www.ssa.gov/section218training/basic_course_8.htm#1
- Walsh, Lisa. *Boosting Nonprofit Board Performance Where it Counts: Onboarding the CEO* (2015). BoardSource blog. Retrieved 2025, from <https://blog.boardsource.org/blog/2015/11/06/boosting-nonprofit-board-performance-where-it-counts-onboarding-the-ceo/>

What is Strategic Planning?

As a trustee, you play a key role in helping shape the future of the library. Planning ahead is essential because without a clear vision, the library may have trouble adapting to changes in the community and staying focused on its mission.

A strategic plan provides that roadmap. It helps us reflect on the library's past, evaluate what it's doing right now in the community, identify opportunities and challenges, and set goals for where the library wants to go in the future. Your involvement in this process helps ensure the library continues to grow and thrive!

The process of strategic planning involves the board of trustees and the library director working together to set clear objectives, choosing the best strategies for the library's future, creating an action plan to achieve its goals, and regularly checking progress along the way. Simply put by [Funding for Good](#), "A strategic plan is a written roadmap for where an organization is going, how it will get there, and specific ways to determine if the organization has 'arrived' at the destination." **Please note that it's important the board of trustees leads this process with the library director's involvement.**

The planning process typically takes anywhere from three months to a year, and the strategic plan is usually designed to cover a period of three to five years. This gives the library clear focus and direction within a manageable frame of time.

However, it's important that the strategic plan isn't just created and then forgotten on a shelf. Research shows that [more than 60% of strategic plans](#) are never fully carried out. Instead, the plan should be a living document regularly used in discussions, program planning, and services improvements as the library adapts to changes in the community.

Why is it Important?

Prioritizing activities can be tough without a clear plan. Without goals in place, the library's work may miss the mark and fail to support its mission. The library could end up providing services that aren't in line with its goals, which can lead to staff burnout, lower morale across the organization, and higher turnover rates. It becomes really challenging when there's no plan that looks to the future.

A strategic plan acts like a roadmap, helping the library stay on track and measure progress toward its goals. The planning process looks at the library's current situation, prepares for changes, and sets a clear direction to handle those changes while staying true to the library's mission, vision, and values.

For you as a board trustee, the planning process is a chance to understand the library's purpose and how it connects with the community's needs. An effective plan can help the library adapt to trends, challenges, and opportunities that affect both the library and its community.

Without a clear plan for the future, the library's role and value in the community could be questioned. If the community doesn't see how the library aligns with their aspirations and challenges or doesn't understand the services it offers, they may look for alternatives.

What Does it Involve?

Before the board of trustees begins leading, creating, and approving a strategic plan for the library, there are several important steps to take. Some steps include:

1. **Use Your Knowledge and Expertise:** Your understanding of the community and your skills are valuable. While you bring important insights to the table, remember to leave personal interests out of discussions.
2. **Think Big Picture:** As a trustee, focus on the library's overall goals and direction. Leave detailed planning and daily operations to the library director and staff.
3. **Review the Library's Mission and Vision:** Ensure the library's mission, vision, and values still reflect its role in the community. If they no longer do, consider updating them to better align with the library's purpose. The mission, vision, and values help set the stage for the goals and objectives determined for the strategic plan.
4. **Understand the Community:** Think about who the library serves and how it meets the community's needs. Gather input from community members, partners, and even non-users to guide the plan's goals. Consider using focus groups and surveys to obtain vital information -what kind of questions can be asked that get to the heart of your community?
5. **Gather Community Data:** Collect reliable data about the community, including population, housing, economics, and social factors. This will help ensure the library's plan aligns with both current and future needs. A list of possible data resources can be found in the *Community Engagement* section of [The Library's Stakeholders](#) section of this LibGuide.
6. **Analyze Library Usage and Staffing:** Review data on how the library is being used, including circulation, program attendance, and staffing needs. Consider if the library could better serve the community by adjusting its services. Gathering data on comparable libraries in Pennsylvania and beyond may also provide insight.
7. **Hold Discussions:** Have conversations with the full board of trustees, library director, and staff to evaluate the environment that affects the library. Tools like [environmental scans](#) (PESTLE, STEEPLE, SKEPTIC) can help identify important external and internal factors. Internally, a SWOT analysis can also be useful to determine internally the factors that exist for the library.

8. **Review the Budget:** Ensure the library’s budget can support the strategic plan. If needed, look at expenses and potential revenue sources to make the plan achievable.
9. **Create the Plan:** After gathering data, identify key trends and use that information to design the strategic plan. Set clear goals and objectives that balance opportunities with the library’s resources. There are many examples available of what great strategic plans look like, and many provide one-sheet summaries for the community and stakeholders, with a more detailed plan for internal use.

The strategic planning process helps create alignment between the board, staff, and community, ensuring the library continues to have a positive impact and a clear direction for the future.

If you are interested in viewing examples of library strategic plans, see the *Helpful Resources* section.

Community Involvement

As trustees, your leadership helps ensure the library remains relevant and responsible to the people it serves. That starts with a deep understanding of the community - both those who are actively using the library and those who aren't. Working with your director on an initiative to engage with your community is vital to creating a strategic plan that's responsive and meaningful.

Not only should you connect with your community to listen and learn as a trustee, your director and library staff should also gather input from a cross-section of the community, including patrons, partners, and non-users. Tools like surveys, focus groups, and informal conversations can uncover needs and perspectives the library may not yet be aware of. When the community is genuinely involved in shaping the library's direction, they feel connected to its future and invested in its success. That kind of engagement can build long-term support for the library and community trust.

As you are guiding this process, here are some questions to consider:

- Who is the library serving well, and who might the library be missing?
- What are the biggest challenges or unmet needs in the community?
- What would make the library a more essential part of everyday life for more people in our community?

Your insight and advocacy as a trustee are crucial in ensuring the library's plans reflect the real needs and aspirations of the community. For more information about the importance of library services aligning with the community, see the *Community Engagement* information in [The Library's Stakeholders](#) section of the LibGuide.

Working with a Consultant

If there are funds available, consider hiring a strategic planning consultant to lead the process. A consultant can manage the entire effort, help the library engage with the community, facilitate discussions with both the board and staff, and ensure a strategic plan is created. Their impartiality can help avoid groupthink and power struggles, making it easier to reach agreement on the plan.

Hiring a consultant allows everyone to be part of the discussions, while also giving the board president and library director the chance to collaborate with the consultant and fully participate in the process.

Board Retreats

One way to develop a strategic plan is by holding retreats that focus on this task. According to the [Association of Community College Trustees \(ACCT\)](#), a board retreat is a chance for board trustees to explore new issues, address concerns, clarify roles, set goals, and build a stronger, more unified board.

Taking the time for a retreat outside of regular meetings helps board members get to know each other better and appreciate the unique skills and experience each person brings. A change of environment can also spark creativity and allow everyone to focus more deeply on the task of developing a strategic plan.

Communicating the Plan

Once your strategic plan is approved, share it with the library staff, community, partners, and stakeholders so everyone knows the library's future direction. Think about where to publicize the plan and with your library director, how to prepare staff to implement the goals.

The plan's goals and objectives will serve as milestones for measuring progress. During board meetings, set aside time to review how the library is following the plan and tracking success. Keep in mind that the plan should be flexible – if unexpected events arise, it's okay to adjust reflect the current situation.

Other Plans to Consider

Libraries often have additional plans that support their strategic goals. Some common plans include:

Facilities Plan: This plan focuses on the library's physical space, outlining current and future needs, as well as how buildings are managed and maintained. It helps ensure the library's facility supports its operations. [Spacewell](#), a company that focuses on building performance, provides a nice overview of the possible components to consider in designing a facilities plan, and why it's important for an organization.

Disaster Recovery Plan: This plan details how the library will respond to unexpected events, either in the library or community, ensuring it can resume operations quickly after a disruption. [IBM's](#) article on disaster recovery planning provides helpful considerations for this type of plan.

Sustainability Plan: This plan looks at the library's environmental impact, social contributions, and ethical governance, ensuring it positively affects both the community and the environment. [McKinsey & Company](#), a firm focused on how organizations can improve in these areas, provides a helpful overview of why this plan is important not just for the library, but for external stakeholders.

Technology Plan: This plan helps guide the library's use of technology, both current and future, to achieve its goals more efficiently. [Sterling Technology Solutions](#), a firm that provides IT consulting services, describes how this plan can move an organization forward more effectively.

The *Helpful Resources* section offers links to libraries with examples of these plans.

Helpful Resources

Below are some examples of different types of plans as well as resources.

Strategic Planning:

- [2022-2024 Strategic Plan](#), and a [One Page Quick Look](#), Bethlehem Area Public Library, Pennsylvania
- [2022-2026 Strategic Plan](#), Cumberland County Library System, Pennsylvania
- [2024-2029 Strategic Plan](#), Enoch Pratt Free Library, Maryland
- [2023-2025 Strategic Plan](#), Hinsdale Public Library, Illinois
- [2026-2030 Strategic Plan](#), Iredell County Public Library, North Carolina
- [2025-2028 Strategic Plan](#), Memorial Library of Nazareth & Vicinity, Pennsylvania
- [2021-2026 Strategic Plan](#), New Rochelle Public Library, New York
- [2022-2026 Strategic Plan](#), Reading Public Library, Pennsylvania
- [2025-2030 Strategic Plan](#), Oak Bluffs Public Library, Massachusetts
- [2025-2029 Strategic Plan](#), Summit Public Library, New Jersey
- [2020-2024 Strategic Plan](#), Superior Public Library, Wisconsin
- Additional Resources:
 - American Library Association: [Planning and Evaluation](#)
 - BoardSource: [Nonprofit Strategy and Planning](#)
 - National Council of Nonprofits: [Strategic Planning for Nonprofits](#)
 - United for Libraries: [A Library Board's Practical Guide to Strategic Planning](#)
 - WebJunction article: [Align library services with community aspirations](#)

Facilities Planning:

- [Facility Master Plan](#), Cincinnati & Hamilton County Public Library, Ohio (July 2023)
- [Facilities Master Plan](#), Lexington Public Library, Kentucky (2019)

- [Citywide Library Facilities Plan](#), Omaha Public Library System, Nebraska (2023-2043)
- Additional Resources:
 - American Library Association:
 - [Facilities](#)
 - [Library Equipment & Facilities Management: Safety & Security](#)
 - [Safety and Security in Libraries: Home](#)
 - North Dakota State Library: [Library Planning: Space Needs Assessment](#)
 - OSHA: [How to Plan for Workplace Emergencies and Evacuations](#)

Disaster Recovery Planning:

- [Emergency Preparedness & Disaster Plan](#), Hamburg Public Library, New York (2019)
- [Disaster Plan](#), Huntsville-Madison County Public Library, Alabama (2022)
- [Disaster/Emergency Response & Recovery Plan](#), Rock Island Public Library, Illinois (2017)
- Additional Resources:
 - American Library Association:
 - [Emergency Preparedness](#)
 - [Resource Guides](#)
 - FEMA: [Planning Guides](#)
 - Library of Congress: [Emergency Management](#)
 - OSHA: [How to Plan for Workplace Emergencies and Evacuations](#)

Sustainability Planning:

- [Sustainability and Climate Change Strategy](#), British Library, United Kingdom (2024-2030)
- [Sustainability Plan](#), Concord Free Public Library, Massachusetts (2021-2025)
- [Sustainability](#) and [Policy](#), Longwood Public Library, New York
- [Sustainability](#), North Bellmore Public Library, New York

- Additional Resources:
 - American Libraries: [Sustaining for the Future](#)
 - American Library Association: [Sustainability and Libraries](#)
 - EveryLibrary: [Libraries and Sustainability: A Guide](#)
 - IFLA (International Federation of Library Associations and Institutions): [Guidelines for Green and Sustainable Libraries](#)
 - [Sustainable Libraries Initiative](#)
 - [National Climate Action Strategy for Libraries](#)

Technology Planning:

- [Technology Plan](#), Eagle Public Library, Idaho (2024-2028)
- [Technology Plan](#), Portsmouth Free Public Library, Rhode Island (2025-2028)
- [Technology Plan](#), Shaker Heights Public Library, Ohio (2021-2023)
- [Interim Technology Plan](#), Wichita Public Library, Kansas (2024-2025)
- Additional Resources:
 - WebJunction courses:
 - [Library technology planning for today and tomorrow](#)
 - [Prioritizing Accessibility and Disability Inclusion at Your Library](#)
 - WebJunction article: [Writing goals and objectives for a technology plan](#)

Resources:

Strategic Planning Section

- Association of Community College Trustees (ACCT). *Why Hold a Board Retreat*. Retrieved 2025, from <https://www.acct.org/governance-services/board-reatreats-and-workshops/why-hold-a-board-retreat>
- Belk Olson, Andrea. *4 Common Reasons Strategies Fail* (2022). Harvard Business Review (HBR). Retrieved 2025, from <https://hbr.org/2022/06/4-common-reasons-strategies-fail>
- Blanchard, Tom. *Crafting the Future: The Art of a Strategic Technology Plan* (2024). Sterling Technology Solutions. Retrieved 2025, from <https://www.sterling-technology.com/blog/technology-plan>
- BoardSource. *Nonprofit Strategy and Planning*. Retrieved 2025, from <https://boardsource.org/fundamental-topics-of-nonprofit-board-service/nonprofit-strategic-planning/> (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- De Smet, A., Gao, W., Henderson, K., & Hundertmark, T. (2021). *Organizing for sustainability success: Where, and how, leaders can start*. McKinsey Sustainability. <https://www.mckinsey.com/capabilities/sustainability/our-insights/organizing-for-sustainability-success-where-and-how-leaders-can-start>
- Funding For Good.
 - Strategic Planning Consultants: Your Complete Guide (2025). Retrieved 2025, from <https://fundingforgood.org/strategic-planning-consultants-guide/>

- What is a Strategic Planning Timeline? (2023). Retrieved 2025, from <https://fundingforgood.org/strategic-planning-timeline/>
- IBM. *What is a disaster recovery plan (DRP)?* Retrieved 2025, from <https://www.ibm.com/think/topics/disaster-recovery-plan>
- Ingram, Richard T. (2009). *Ten Basic Responsibilities of Nonprofit Boards*. (3rd ed., pp. 39, 41-42). BoardSource. <https://shop.boardsource.org/store/s/product/ten-basic-responsibilities-of-nonprofit-boards/01tQq000007RvHVIA0>
- Spacewell (2024). *Developing a facility management strategy: key components for success*. Retrieved 2025, from <https://spacewell.com/resources/blog/developing-a-facility-management-strategy-key-components-for-success/>
- State Library of Pennsylvania - Office of Commonwealth Libraries. *Leadership By Design - PA Library Staff Academy*. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>

Policy versus Procedure: What's the Difference?

Creating, approving, and enforcing clear policies as a board of trustees is crucial for providing quality library services to your community. Strong policies help support the library's goals and objectives and give your library director a solid framework to manage daily operations effectively.

A **policy** is essentially a plan or approach that guides decisions and actions. It helps library staff and you as a trustee know how the library operates, and helps the community understand how to use the library. Policies should be approved by the library's board of trustees and should reflect the library's mission.

On the other hand, a **procedure** is a set of specific steps that are followed in a particular order. Procedures help in understanding how to carry out a policy and can be followed by library staff and the community when accomplishing a task. They don't need approved the library's board of trustees and often provide clear, step-by-step instructions to ensure a policy is followed correctly.

It's important to know the difference between a policy and a procedure and understand which one to develop and use for guidance. This [blog post](#), written by Erin Halovanic, Director of Library Services at [HSLC](#) (Hosting Solutions and Library Consulting), a partner of the Office of Commonwealth Libraries (OCL) in supporting Pennsylvania libraries, shares some key points for us to consider about whether a policy or procedure is best for a situation:

If it tells you WHY you do it, it's a policy.

If it tells you HOW you do it, it's a procedure.

Policies are important because they:

- Help support the library's mission, vision, and values.
- Guide decision-making and help with long-term planning.
- Provide direction for library staff in doing their jobs.
- Define what services the library offers and how they will be delivered.
- Define the expectations of the community in using the library's services.
- Serve as a guide for procedures that follow a policy.

- Ensure fair and equal treatment for everyone who uses the library.

For policies to be the most effective, they should be developed in partnership with the Board of Trustees and Library Director, and considering the community the library serves. Your library director knows the community, its patrons, the services offered, and the staff well. Policies should be consistent in their format, reviewed at least once a year, and updated (with dates noted of amendments) when necessary to remain legally enforceable.

For a policy to be legally enforceable, it must (from the previous version of this manual, titled *Getting on Board! Tools for Board Development and Assessment*):

- Follow applicable local, state, and federal laws
- Be reasonable
- Align with the library's purpose
- Be clearly written
- Be applied fairly and without discrimination

Sample Policies and Procedures

This LibGuide also has a [section with sample policies and procedures](#) available to help libraries provide excellent and equitable library services to everyone in Pennsylvania. These resources are developed by the Policy and Procedure Development Steering Team. The Steering Team includes members from a variety of roles, skills, and experiences from public libraries across the Commonwealth.

In this LibGuide, you'll find both required and recommended sample policies and procedures. Library policies should meet the needs of the library, its staff and community, and be approved by the library's board of trustees. These samples are not considered to be a one-sized-fits-all approach, and should be used as a guide not to be taken as legal advice. **For any legal questions or when adopting a policy into practice, please consult the library's attorney.**

While the Bureau of Library Development (BLD) advises libraries on many topics, it is not a provider of legal advice, an advocacy organization, or a law enforcement agency. Public libraries are independent organizations and the BLD does not govern local library policies and activities or municipal decisions regarding libraries. The BLD's ability to hold libraries accountable to library laws is only related to the eligibility and standards required of libraries that receive state aid or other state and federal funds administered by the office.

Resources:

Policy Development Section

- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- Halovanic, Erin. *Policy vs. Procedure: Why It Matters* (2023). Hosting Solutions & Library Consulting (HSLC). Retrieved 2024, from <https://hslc.org/2023/09/13/blog-1/>
- Merriam-Webster. *Policy*. In Merriam-Webster.com dictionary. Retrieved 2024, from <https://www.merriam-webster.com/dictionary/policy>
- Merriam-Webster. *Procedure*. In Merriam-Webster.com dictionary. Retrieved 2024, from <https://www.merriam-webster.com/dictionary/procedure>

The Importance of Budgeting

The board of trustees works with the library director to create the library's budget. The budget decides what services the library will offer and how much money is allocated to each service. It shows what the library values most in serving the community.

Working together to plan, review, and approve how the library spends and generates revenue is crucial for the library's future success. WebJunction, an educational resource for libraries, provides a helpful guide to the [budget development process](#).

The Role of Fiscal Oversight

As a board trustee, you are ultimately responsible for making sure the library's finances are handled properly and ethically. The PA Library Code ([24 Pa. C.S. § 9318\(f\)](#)) states: “**Control of all funds.** – Any money appropriated for the establishment or maintenance of a local library and all moneys, if any, received from other sources for the use of the library shall be under the exclusive control of and disbursed under the direction of the board.”

The board of trustees is legally responsible for making sure the library has enough money to operate, doesn't spend more than it can afford, and keeps its assets safe.

Fiduciary obligations focus on the facts, figures, finances, and risks to the library and include:

- **Understand the library's funding:** Be aware of where the library's money comes from, how to increase it, and how to best use these funds to serve your community.
- **Establish Financial Policies:** Create and follow financial policies that balance both short-term and long-term needs of the library.
- **Follow Duties of Care, Loyalty, and Obedience:** Make financial decisions that are best for the library and be accountable for how the money is used, keeping the community's interests in mind.
- **Follow legal and accounting standards:** Make sure all financial actions are legal, transparent, and honest. Follow proper accounting standards and rules, and avoid conflicts of interest.
- **Review and monitor financial reports:** Read and interpret key financial reports regularly to make informed decisions. Ensure these reports are completed accurately and submitted on time for audit or financial review.
- **Securing and directing funds for the library:** Legally raise money for the library from different sources like local government, organizations, individuals, and grants by using fundraising plans and promoting the library's needs.

- **Ensure ethical spending:** Make sure funds are spent in an ethical manner and compare monthly financial reports against the budget to ensure the library is staying on track.
- **Awareness of external factors:** Be aware of outside events or changes that could affect the library's finances and plan for them.
- **Maintain fiscal integrity:** Ensure the library complies with local, state, and federal laws, as well as the library's bylaws, to maintain financial integrity and protect the library from liability.
- **Plan for the library's future:** Setting funds aside in a reserve for future improvements, upgrades, and building projects for the library.

Ultimately as a trustee, no matter the circumstances, you commit to doing what is right for the library.

You also need to understand how a state-aided public library tracks the funds it receives. Each year, the library submits a report to the Office of Commonwealth Libraries (OCL), called the PA Public Library Data Collection Report (or more commonly known as the Annual Report). This report includes all the financial data and required statistics for the year. Check with your library director to see the most recent annual report to understand what information is included.

Additionally, if the library receives more than \$50,000 in state aid during the year, it must undergo a full financial audit every year. If the state aid is under \$50,000, the library only needs an audit every three years, with financial reviews in between.

Bonding of the Treasurer

The PA Library Code ([24 Pa. C.S. 9318\(e\)](#)) requires the library's board treasurer to have a bond. This bond is a guarantee that the treasurer will follow all local, state, and federal laws, as well as ethical guidelines, while in their role. It serves as insurance for the library, protecting its assets and ensuring responsible financial management. Check with your board president and an insurance professional for guidance on bonding.

Resources:

Budgeting and Fiscal Oversight Section

- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93, Public Library Code, §9318 - Local Library Governance*. Retrieved 2024, from www.legis.state.pa.us/WU01/LI/LI/CT/HTM/24/24.HTM
- Rees, Ed (2023). *Fiduciary responsibility: A complete guide with examples*. BoardEffect. Retrieved 2025, from <https://www.boardeffect.com/blog/fiduciary-responsibilities-nonprofit-board-directors/>
- State Library of Pennsylvania - Office of Commonwealth Libraries.
 - *Leadership By Design - PA Library Staff Academy*. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>
 - *Board Governance 101 - PA Library Staff Academy*. Retrieved 2024, from <https://my.nicheacademy.com/paocl-staff/course/23639/lesson/10480>
- Wisconsin Department of Public Instruction - Public Library Development (2012). *Developing the Library Budget*. WebJunction. Retrieved 2025, from https://www.webjunction.org/documents/webjunction/Developing_the_Library_Budget.html

Raising Funds and Developing a Funding Plan

When funds from state and local government sources are not enough to cover a library's operating costs or maintain reserve funds, board trustees are responsible for raising the money that is necessary to continue library operations in serving the community.

Based on your library's funding structure and legal status, your library may not be able to raise funds directly and rely on other groups (such as friends groups) to support the library in revenue development. Check with your library director and board president on how funds are raised for your library.

Libraries can always benefit from additional funding. Once your operating costs are covered, the next step is to focus on raising extra funds to enhance services and prepare for the unexpected challenges. Having a clear funding plan helps set a direction for how to raise the necessary funds.

It's important for libraries to think beyond traditional fundraising methods like book sales, bake sales, and community events. While these activities can engage the community and bring in some funds, they are often not enough to generate significant support. According to Vanessa Chase Lockshin from The Storytelling Nonprofit, these types of fundraising are transactional – they don't encourage donors to fully understand the impact of their contribution or foster a deeper connection with the library.

A funding plan serves as a roadmap, outlining a targeted strategy and clear objectives to help the library meet its financial goals. It's essential for all board trustees to be actively involved in both creating and implementing this plan to ensure the library's long-term success.

Here are some considerations for designing and implementing an effective library funding plan:

- **Ensure Proper Policies:** Establish board-approved policies for accepting gifts and donations, and an investment policy to guide financial decisions.
- **Identify Funding Needs:** Determine the library's financial goals, what services require funding, and the resources needed to achieve long-term plans.
- **Align with Strategic Plan:** Ensure the funding plan reflects the library's mission, vision, values, and strategic goals and priorities.

- **Development Committee:** While a committee can help in creating a funding plan, all trustees must share responsibility in raising funds.
- **Fundraising Budget:** Account for expenses like staffing, solicitation letter creation and mailing, meetings with donors, and other related costs in raising funds.
- **Create a Case for Support:** Prepare a document for current and potential donors that highlights the library's history, services, financial needs, and the impact of donations. Include information that communicates why donors should support the library.
- **Know Your Donors:** Keep a record of current and potential donors and identify those who may contribute more significantly. Research the community and explore funding from organizations, businesses, and government sources. Refer to the tab on *Sources of Funding* in this section for more information.
- **Consider Other Fundraisers:** Be aware of other local fundraising efforts and explore potential collaborations with other organizations for raising funds.
- **Stay Informed on Trends:** Research local, state, and national fundraising trends, and consult with experts to refine your strategy.
- **Develop a fundraising strategy:** Plan a detailed timeline for soliciting donations through mailings, meetings, online platforms, and media partnerships. Monitor progress and adjust the plan as needed.
- **Build Relationships:** Fundraising isn't just about asking for money. Focus on building ongoing relationships with donors and sharing the impact of their contributions.
- **Show Appreciation:** Always thank donors with personal notes, and share the impact of their contributions through newsletters and other communications.
- **Reflect on the Process:** Celebrate fundraising successes and evaluate the plan. Are there adjustments to be made for next year?

Some information from this section is adapted from content available from [*The Storytelling Non-Profit's Vanessa Chase Lockshin*](#) and [*The Ultimate Fundraising Plan for Nonprofit Organization's Josh Bloomfield*](#).

Board Trustee Contributions

As a board trustee, it's important to lead by example when it comes to supporting the library financially. A meaningful contribution is one that reflects your role as a trustee, is as generous as your personal finances allow, and sets a positive example for others to follow.

It's valuable for the library to be able to report that 100% of its board trustees make meaningful contributions. Not only does this show your commitment, but it also strengthens your ability to ask others to support the library, since you are leading by example.

Sources of Funding

As a board trustee, you are part of a board fully and legally responsible for the proper ethical management of the library's funds. A library's funding comes from several sources. These sources can vary based on the type of library, the community it serves, and the standards it needs to follow to receive State Aid funds. As a board trustee, you are legally responsible for understanding and overseeing the library's finances. To learn what funds make up the library's revenue, ask your library director and board president for a copy of the budget with an explanation of where the funds come from and how the funds are used.

Sources of funding can include:

State Funding:

- **State Aid Funding:** Known also as the Public Library Subsidy, these funds are paid to public libraries meeting the required standards outlined in the [Statute \(24 PA. C.S. Education. Chapter 93\)](#) and the [Regulations \(22 PA Code § 131; § 141.\)](#). More information about the levels of State Aid, including payment distribution information, is available on the [State Aid Resources for Pennsylvania Public Libraries LibGuide](#). [The statutory funding formula \(§9334 – §9340\)](#) has not been in use since 2003 when significant state budget cuts occurred. As a result, laws are enacted each year that outline how state aid is distributed (more information can be found on the [State Aid Resources LibGuide](#) and [Section 2328. State Aid for Fiscal Year 2024-2025](#)).
- **Keystone Recreation, Park, and Conservation Fund Grants for Public Library Facilities (Keystone Grants):** Keystone grants are funds applied for and granted to municipalities with public libraries for approved large projects, including new buildings and major renovations. More information about this grant is available on the [State Library's Keystone Grants for Public Library Facilities](#) webpage.

Local Funding:

- **Local Government Funding:** This funding may include support directly from the library's county, school districts, or municipalities. Depending on your library structure, you may receive funding through your Federated Unit, a tax millage, per-capita allocations, or other earmarked funds from government sources.

- **Other Funding Sources:** This funding includes donations from local businesses, organizations, and community members. Other sources include United Way contributions, funds from the library's investments, money raised through events, and community donation appeals. [EITC](#) (Educational Improvement Tax Credit) funding is another local source – you can contact your [state elected officials](#) to learn more.

Federal Funding:

- **LSTA Grant Funding:** The [Library Services and Technology Act](#) (LSTA) is a federal program for libraries focused on technology services and access to library resources. State library agencies across the United States use LSTA grants to support subgrants to libraries.
- **Other Federal Revenue:** Includes federal employment program revenue, funds received for renovations, purchases of furniture and equipment, and other federal revenue.
- **E-Rate:** The [FCC's E-Rate program](#) makes telecommunications and information services more affordable for schools and libraries. With funding from the [Universal Service Fund](#), E-Rate provides discounts for telecommunications, Internet access, and internal connections to eligible schools and libraries.

For libraries that are part of a Library Federation, there may be funding formulas determined at the local level with how state and local funds are allocated and distributed. In addition, County Library Systems are provided with County Coordination Aid to implement county-wide library services, and these state funds are not part of a funding formula allocated to the libraries in the County Library System. Check with your library director, federated system administrator, or board president to learn about how your library is funded.

Resources:

Revenue Development Section

- *Pennsylvania Code, Title 22, Part IX. State Library and Advisory Council On Library Development, §§131; 141.* Retrieved 2024, from www.pacodeandbulletin.gov/Display/pacode?file=/secure/pacode/data/022/partIXtoc.html&d=
- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93, Public Library Code, §§9301-9376.* Retrieved 2024, from www.legis.state.pa.us/WU01/LI/LI/CT/HTM/24/24.HTM
- American Library Association (ALA). *Library Services and Technology Act.* Retrieved 2025, from <https://www.ala.org/advocacy/fund-libraries/LSTA>
- Bloomfield, Josh (2024). *The Ultimate Fundraising Plan for Nonprofit Organizations.* Givecloud. Retrieved 2025, from <https://givecloud.com/trustraising/blog-posts/fundraising-plan-for-nonprofits/#:~:text=In%20this%20comprehensive%20guide%2C%20we%20will%20walk%20you,the%20secrets%20to%20effective%20fundraising%20for%20nonprofit%20organizations.>
- Bureau of Library Development, Office of Commonwealth Libraries (2025). *State Aid Resources for Pennsylvania Public Libraries.* LibGuides at the State Library of Pennsylvania. Retrieved 2024, from <https://pa-gov.libguides.com/stateaidresource>
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment.*
- Federal Communications Commission (FCC) (2024). *E-Rate: Universal Service Program for Schools and Libraries.* Retrieved 2025, from <https://www.fcc.gov/consumers/guides/universal-service-program-schools-and-libraries-e-rate>
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- Ingram, Richard T. (2009). *Ten Basic Responsibilities of Nonprofit Boards*. (3rd ed., pp. 51-54). BoardSource. <https://shop.boardsource.org/store/s/product/ten-basic-responsibilities-of-nonprofit-boards/01tQq000007RvHVIA0>
- Chase Lockshin, Vanessa. *The Best Fundraising Advice for Libraries*. The Storytelling Nonprofit. Retrieved 2025, from <https://www.thestorytellingnonprofit.com/blog/fundraising-ideas-for-libraries/>
- PA General Assembly (2023). *House Bill No. 301*. Retrieved 2025, from <https://www.palegis.us/legislation/bills/text/PDF/2023/0/HB0301/PN2311#page=102>
- Palmetto Surety Corporation (2024). *The Cost of Bonding a Treasurer: What You Need to Know*. Retrieved 2025, from <https://www.palmettosurety.com/2024/04/how-much-does-it-cost-to-bond-a-treasurer/>

Definitions

Libraries use many terms to describe how they share information about their services, programs, and resources with the community. Regardless of the specific terms used, the main goal is to communicate positively and clearly about the library and how it benefits the community.

Publicity refers to spreading messages through official channels like social media, press releases, or news conferences. The aim is to raise awareness about the library, create a positive image, and build credibility. Positive publicity, a part of public relations and media relations, can help increase the use of library resources and services. It can include working directly with the media on messages to the community, providing updates during emergencies via social media, or speaking about the library at public events.

Public relations involve the strategic approach to building strong relationships between the library and the community. According to the [Public Relations Society of America \(PRSA\)](#), it's a communicating process that focuses on shaping how the public views the library. The goal is to create a long-term positive perception of the library, its mission, and its services, helping it be seen as a trusted and reliable resource to the community. The way the community perceives the library, whether positively or negatively, affects how well the library can connect with and serve the public.

Media relations involve creating and maintaining a positive relationship between the library and various media outlets, such as journalists, bloggers, and other community influencers. This can include working with the media to share the library's message in a credible way and generating publicity that highlights its value to the community.

Marketing helps the library understand and meet the needs of the community. It involves researching to make sure the library's offerings align with what people actually want. Marketing is a part of public relations, and it helps the library stay informed of community changes. The library director usually handles marketing but may ask the board of trustees for support. The goal is to continually refine the library's services based on what the community needs. Marketing also includes **advertising** (paid promotion of library services) and **promotions** (encouraging the community to use the library's resources). Examples include newsletters, flyers, billboards, and email campaigns.

Branding is about connecting the library with a logo, slogan, image, or phrase that makes it easily recognizable. It helps the community instantly associate these visuals or words with

the library, building trust and loyalty. A well-designed tagline or logo creates a consistent, memorable message that people remember. [Public Libraries Online](#) has a great article on how taglines and logos help shape a library's brand.

Advocacy is about supporting the library in securing public funding and resources, ensuring it can continue to serve the community. It also involves encouraging library supporters to help spread the word about the library's value. Advocacy is discussed in more detail in its own section of the LibGuide.

All of these activities can work together to build a strong, positive relationship between the library and the community, helping to ensure its resources and services are used and valued.

Why Promote the Library?

Every day, there are chances to promote your library. Surprisingly, not everyone in your community fully understands what the library offers or how it can help them. That's where you, as a board trustee, can help!

Libraries need to be talked about for several reasons:

- Libraries are [competing for attention](#) against online resources, streaming and cable services, gaming, social activities, and commercial booksellers. Members of your community spend their time where they find value, and libraries can be one of those spaces.
- While [most people have a positive view of libraries](#), they may not always understand the library's needs. Educating both library users and non-users, as well as decision-makers and elected officials, can help gain more support for the library.
- There's a strong need to raise awareness about the [reliable, academic information and resources](#) available at public libraries.

Even though the benefits of a public library might be clear to some, they aren't always obvious to everyone. In addition to the obvious benefits of free access to books, information, and services, public libraries provide real economic value to everyone who uses them. That's why it's so important to promote the library and its programs. As a trustee, you're expected to be familiar with the library's services and share that information with the community. By building relationships with decision-makers, library patrons, and the community, you can help position the library for growth and ensure it adapts to meeting future needs. Your active involvement in promoting the library will increase its use, spotlight its services and programs, refresh any outdated perceptions about libraries, and strengthen support from all angles, including social, emotional, political, and financial. It will also help communicate the strong value that public libraries bring to the community.

Media and Communications Plan

Having a media and communications plan for the year can assist in a more successful promotion of the library in the community. This type of plan helps address misunderstandings, highlight the library's benefits, and builds stronger connections within the community. The ways the library communicates with the public, whether it's through digital, written, or spoken messages, can have a dual impact on both the library and the community it serves.

The American Library Association (ALA) highlights several [benefits of having a media and communications plan](#) in their media relations handbook, including:

- Increasing public awareness of the library's programs, resources, and services
- Attracting new public and private partners for the library
- Enhancing or changing the library's public image
- Encouraging donations of money, materials, services, and time
- Gaining support for funding from local, state, and federal sources, as well as individual donors
- Reaching out to new or underserved community members, especially marginalized groups
- Clearing up misconceptions about what libraries do and how they are funded
- Mobilizing community leaders to become supporters and advocates
- Building connections with other libraries regionally, statewide, and nationwide
- Strengthening both public and private support for libraries

Discussing this plan and its progress at board meetings ensures all trustees stay informed about the goals, timeline, and actions to be taken.

[ALA's toolkit](#) referenced provides a comprehensive guide for an effective media and communication plan.

How You Can Help

As a board trustee, there are several ways you can support your library's media and communications plan:

- Write letters to the editor of your local newspaper to highlight how the library benefits the community and ways people can support it.
- If your library has a community newsletter, offer to write a column explaining why you serve as a trustee.
- If the library has a blog, consider writing posts from your perspective as a board trustee.
- Build a network of advocates to help spread the word about the library's benefits to the community.
- Offer to speak at local meetings, such as civic groups, professional groups, or social groups to educate others about the library's value.
- Welcome attendees at library programs and take a moment to talk about how the library can support them.
- Present certificates of appreciation to the library's volunteers, Friends' members, and other supporters.
- Volunteer your time to set up informational displays about the library.
- Represent the library at local community events.
- Create a short 'elevator speech' and share the library's story whenever you have the chance.

An **elevator speech** is a quick way to introduce yourself and your role at the library, explain why the library is important in the community, and encourage others to support it. Keep your message brief – aim for about a minute. See this [infographic](#) from the American Library Association's ALSC Public Awareness Committee for examples of values-based elevator speeches.

Resources:

Media and Communications Section

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- Rodsevich, Matias (2024). *What is Media Relations?* PRLab. Retrieved 2025, from <https://prlab.co/blog/what-is-media-relations/>

What is Advocacy?

As a library trustee, one of your most important roles is to speak up for the library and its mission to serve the community. Everyone who works at or supports the library has a role in advocacy, but as a board trustee, your voice carries extra weight.

Advocacy can take many forms and means taking action to help bring in support, whether that's in funding or policy changes, that benefits public libraries. According to the [Public Library Association \(PLA\)](#), advocacy is about influencing decisions at all levels of government to help libraries thrive.

Libraries need people to stand up for them just as much as people need libraries. As a trustee, you have a special perspective: you are a volunteer who gives your time and a community member that pays taxes. That makes your support feel genuine and community-driven, compared to library staff who might be seen as just doing their jobs.

Being an advocate means building and maintaining good relationships with community members, especially people who can make decisions that affect the library, such as local officials and government entities. Keeping in touch and sharing what the library is doing builds trust and makes it easier to ask for support when it's needed.

The more you talk positively about the library, the more people will connect you with it. You may find yourself answering questions or hearing ideas about the library while you're out and about - at the grocery store, in meetings, at social events, or even at work. These everyday conversations are a great chance to share how the library helps the community. No matter where or when they happen, what matters most is that you're spreading a positive message.

Importance

The [Public Library Association](#) explains that advocacy helps to:

- Inform the community about the services the library offers and why they are important.
- Show how library services, like access to the Internet, make a positive difference in people's lives.
- Make sure the library has the resources it needs to keep offering essential services to the community.
- Ensure that library leaders have a say in important decisions about funding and policies that affect the library.

In many communities, local officials need to carefully review and justify their spending. That's why it's so important to keep advocating for the library. This can mean regularly speaking at local government meetings or having informal conversations with officials to update them on what the library is doing or to ask for their advice on how the library can grow and better serve the community. These interactions help build strong relationships, which are key to the library's success.

Advocacy Plan

An advocacy plan is a thoughtful strategy to help promote and support the library's mission. This includes activities like lobbying, educating the public, and researching community needs. The goal is to make sure the library has the support it needs to continue serving the community effectively.

As a trustee, you can collaborate with your library director to create a strong plan that delivers clear, consistent messages. Here are some ways you can develop an effective plan:

- **Set Clear Goals:** Define what you want to achieve. Do you want to secure more funding, raise awareness about the library, or push for new laws to support libraries across the Commonwealth? Identify the specific outcomes you hope to see.
- **Assess the Current Situation:** Look at the local community and see who can help support the library. Are there organizations you can partner with to amplify your message? Who might oppose the library's goals, and how can you address those concerns?
- **Plan Key Elements:** Identify the resources you'll need to implement your plan. This might include forming a board committee, creating a budget, and getting volunteer support.
- **Use Media and Communications:** Take advantage of the library's media and communication strategy. Use the library's main messages, target audiences, and communication tactics to reach local and state officials and other government groups.
- **Create an Action Plan:** Develop a practical plan with tasks and deadlines. Recruit others to help lighten the load, and create a yearly timeline that outlines who will do what, when, and how. Make sure the message stays consistent and coordinated with everyone involved.
- **Track Progress:** Regularly monitor how the plan is going. Keep an eye on changes in legislation, funding, and local community issues that might affect your plan. Be ready to adjust the plan as needed.
- **Document Results:** Keep track of the outcomes of your advocacy efforts. This helps improve future strategies and shows what's working or needs adjustment.

- **Show Appreciation:** Be sure to thank the people who support the library and those who help with advocacy, whether it's through financial support, time, or other resources.

For more tips and resources:

- The American Library Association (ALA) provides timely [advocacy resources](#).
- The Public Library Association (PLA) has resources on [public library advocacy](#), including tools such as [The Edge Initiative](#), training such as [The Public Libraries Open Possibility](#), and other information on the importance of advocacy.
- The Pennsylvania Library Association (PaLA) offers [advocacy tips and resources](#), and members of the association have access to their most recent [legislative update](#).

Resources:

Advocacy Section

- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- Public Library Association.
 - *Putting Advocacy Into Practice*. Retrieved 2025, from <https://www.publiclibraryadvocacy.org/putting-advocacy-into-practice/>
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Recruitment and Succession Planning

Creating a well-balanced board is an important task that requires careful planning and strategy. When done right, it can lead to a strong, united, and effective board that brings a variety of skills and experiences to represent the library and the community it serves. BoardSource states, “Every organization’s governing board will only be as effective as its individual members” (p. 65 of 10 Basic Responsibilities of Nonprofit Boards). It’s worth the time and effort to find the best people for the library’s governing leadership, regularly assess the current board for upcoming vacancies, and look for individuals with leadership potential for future officers and committee leadership roles.

There are a few ways new trustees are chosen or recruited for the library’s board:

- **Municipal Appointments:** When multiple municipalities contribute to the library’s funding each appoints trustees, and the municipalities agree on how many trustees will serve on the library’s board (see [§ 9318. Local Library Governance](#) of Title 24. PA. C.S. Education – Public Library Code). The current board is responsible for communicating the specific skills and qualities they are seeking to the municipal officials. A good relationship between the library board and municipal leaders can help influence future trustee appointments.
- **Reputation of the library and board of trustees:** A library with a strong reputation for running efficiently and offering excellent services will naturally attract qualified individuals who want to be part of the board of trustees. If serving on the board is known to be a rewarding and fulfilling experience, it will make recruiting new trustees easier.
- **Governance Committee:** Many library boards have a governance (or nominating) committee that helps identify and recruit potential trustees. This committee looks ahead to anticipate vacancies and assesses the skills and qualities needed on the board. The committee actively seeks individuals who can bring these qualities to the table and provides opportunities for all trustees to learn and grow. Keep in mind though, that recruiting new trustees is the responsibility of the entire board – not just a governance committee. Also, your library director can suggest potential candidates but is not responsible for recruiting them.
- **Your Library Director:** Your library director, who is deeply connected within the community, can be a great resource for identifying potential trustees. Their

knowledge of local individuals and organizations can open up new opportunities for recruitment.

Each open seat is an opportunity to bring in someone who can help advance the library's mission and vision. Effective board recruitment and retention can lead to a leadership pipeline, where trustees gain a deep understanding of the library and community needs, allowing them to make impactful decisions that ensure the library's long-term relevance and success. Over time, these trustees may also be ready to take on more leadership roles, whether by joining committees, or stepping into officer positions.

Developing a succession plan is key to managing the recruitment process, retaining strong trustees, and helping them grown into leadership roles. A well-executed recruitment strategy can uncover individuals who are ready to take on important leadership responsibilities, benefiting both the library and the community. For more details on succession planning for the board, check out the *Terms* and *Term Limits* sections of the LibGuide.

Obstacles

Recruiting the right board trustees for the library can be challenging. Here are a few common obstacles:

- **Lack of knowledge about the library:** Many community members may know where the library is, but they might not fully understand all the services it provides or the impact it has on the community. How can you bridge this gap and help people understand better what the library does? Consider hosting informational events, sharing success stories, or using social media to highlight the library's impact.
- **Lack of knowledge about what's required as a trustee:** Potential trustees may not be aware of what the role involves or what they can expect from serving on the board. How can you make this information clear? You could provide an overview of trustee responsibilities during the recruitment process and offer informational packets, or hold orientation sessions for new candidates to set expectations.
- **Lack of past board experience:** Some people have valuable skills but feel intimidated because they have never served on a board before. How can you encourage these individuals to take the leap? Consider assuring them that serving on the board is a team effort, and they'll have the opportunity to learn and grow in their roles.
- **Past Bad Experiences:** If someone has had a bad experience serving on a board elsewhere, they may be hesitant to join another one. How can you present the library board as a positive, collaborative environment? Talk about the board's teamwork, learning opportunities, and the chance to make meaningful decisions that directly benefit the library and community.
- **Lack of time:** Most people are busy with their personal and professional commitments and may feel they don't have enough time to dedicate to the library board. How can you make it easier for them to decide? Be clear about the time commitment required and explore ways to make the board's work more flexible, such as virtual meetings or scheduling that accommodates different schedules.
- **Unexpected resignations:** Sometimes, trustees may need to resign before their term ends, and these situations can be hard to predict. How can you be prepared for these changes? Having a succession plan in place allows the board to quickly find

replacements when needed, keeping the board strong and able to continue its work smoothly.

By addressing these challenges proactively, you can make the recruitment process easier and attract individuals who are excited to contribute to the library's success. For more ideas about being proactive in the recruitment process, see the next tab.

Recruitment Tips

Here are some ways to help recruit new trustees:

- **Create a Succession Plan:** Outline your recruitment process, current board strengths, and skills needed.
- **Talk About It:** Discuss recruitment at board meetings and set timelines if needed.
- **Clarify Expectations:** Make sure your trustee informational materials are clear and welcoming.
- **Promote Opportunities:** Share that you're recruiting in library newsletters, on social media, and on the library's website.
- **Showcase Your Board:** Post board trustee bios and trustee role descriptions on the library's website.
- **Speak Up:** Accept invitations to talk about the library and the role of trustees, and attend events with your library director.
- **Build Relationships:** Keep strong community connections even when you're not raising funds for the library.
- **Know the Commitment:** Be upfront with the time commitment involved and the leadership opportunities available as a board trustee.
- **Support for New Trustees:** Highlight the onboarding process, learning opportunities available, and any mentorship programs for new trustees.
- **Share the Library's Story:** Talk about the library's history, wins, current challenges, and strategic plan.
- **Include Everyone:** Actively seek out underrepresented voices in your community.
- **Ask Around:** Tap into your network for suggestions on candidates.
- **Plan Ahead:** Track board skills, terms and term limits, and potential future candidates.
- **Use a Formal Process:** Consider using applications, interviews, and informational packets for candidates.

- **Invite Observers:** Welcome potential trustees to attend a board meeting.
- **Look Within:** Consider committee members or Friends group members as future trustees.

Characteristics

Finding the right people to fill board vacancies is key to your library's success. Each open seat is a chance to bring in new perspectives and strengthen the board. Here are some qualities to look for when recruiting:

- **Diverse Representation:** Aim for a board that reflects your community's diversity in demographics such as age, race, gender, background, and experience. Different perspectives lead to better decisions. See the *Library Community Profile* tab in the [Learning About Your Library](#) section of the LibGuide to learn more about obtaining information about your community's makeup.
- **Commitment to the Library:** Seek individuals who believe in the library's mission and values, even if they bring different viewpoints.
- **Time and Energy:** Trustees should be willing to dedicate time to advocacy, raising funds, and supporting the library's growth.
- **Community Awareness:** Candidates should know the local community and support the vision for the library's future.
- **Willingness to Learn:** Ideal candidates are open to training and attending library-related events.
- **Relationship Builders:** Trustees should be able to connect positively with local leaders and community members.
- **Helpful Skills:**
 - Advocacy and Lobbying
 - Business or Finance
 - Construction or Project Management
 - Fundraising
 - Marketing, PR, or Communications
 - Mediation and Conflict Resolution
 - Public Speaking
 - Technology

Terms and Term Limits

Terms and term limits help keep a board fresh, effective, and ready for the future. **They should be clearly outlined in your library's bylaws.**

What They Mean:

- **Term:** How long someone serves on the board.
- **Term Limit:** The maximum number of terms a trustee can serve in a row.

Why they Matter: Having terms and term limits are considered best practices and helps the board stay strong and effective over time.

Benefits of Terms and Term Limits (highlighted by [BoardSource](#)):

- **Fresh Ideas:** New people bring new perspectives and skills.
- **Increased Engagement:** Prevents burnout and keeps energy high among trustees.
- **Shared Power:** Prevents a few people from dominating the board.
- **Smooth Transitions:** Encourages leadership development and avoids disruption when someone steps down from the board.
- **Broader Support:** More people rotate through board service, increasing community involvement.
- **Respectful Transitions:** Provides a natural way for less active members to step down.

Potential Challenges: (highlighted by [BoardSource](#)):

- **Loss of Expertise and Institutional Knowledge:** Experienced trustees eventually rotate off the board.
- **More Recruitment Work:** The board must stay active in finding and orienting new trustees.
- **Team Building Takes Time:** New and seasoned trustees need time to build relationships.

What it Might Look Like: A common model is two consecutive three-year terms (six years total). After that, a trustee takes a break for at least one year before returning.

Example: To prevent all trustees from leaving at once, XYZ Library started with:

- 1/3 of trustees serving 1 year
- 1/3 serving 2 years
- 1/3 serving 3 years
- After that, all new trustees serve 3-year terms and may be reappointed once.
- If filling a vacancy, the trustee serves the remainder of the term

Why This Helps: Term limits support long-term planning and make it easier to handle unexpected changes, like when a trustee needs to step down early from their service on the board.

Even after their board terms end, trustees remain a vital part of the library community. There are many meaningful ways to stay involved, whether it's volunteering at fundraising events, continuing to advocate for library initiatives, serving on committees, or contributing in other impactful ways. Your dedication to the library makes a lasting difference, and your continued support even after serving as a trustee is always welcome and deeply appreciated!

Composition Matrix

A helpful way to understand the strengths and skills of current board trustees, and to spot any gaps, is by creating a **board composition matrix**. This is a chart that shows the skills, experiences, and background each board trustee brings. The Governance committee is usually the best group to create and use this tool. It helps ensure the board is strong in experiences, balanced in skills, and truly represents the community. This matrix should be regularly reviewed and actively used, especially when new trustees are being recruited to fill vacancies on the board.

[Lena Elsenstein](#) from BoardEffect explains a board composition matrix as "a grid that lists the people on the board, or those who have the potential to join the board, along the rows of a grid...A board matrix is a tool that makes it easy to chart the skills, characteristics, and talents that each individual has. A matrix is effective for helping boards build a well-rounded, functional team." The matrix should also include information such as each trustee's term length and whether they are interested or able to take on leadership roles in the future. It's important to see this as a living tool and not just a checklist or something to complete once. It should be used as a way to continuously improve the board by encouraging engagement, inclusion, and strong community representation.

The main goal of a board composition matrix is to clearly see where the board stands now, identifying any missing skills or talents, and decide what the ideal board looks like to help the library meet its strategic goals and fulfill its mission.

An example of a board composition matrix is available in the *Sample Documents* section of the [Appendix](#).

Assessment

Regularly checking in on how the board is doing, both as a group and individually, is a great way to stay on track and improve. It helps make sure the board is supporting the library's mission, following its strategic plan and board goals, and that everyone is working effectively together.

Who Leads the Process: Board evaluations are usually led by the governance committee and board president. They help keep the process fair, organized, and objective.

How it Helps: (adapted from [BoardSource](#) and [Harvard Law School's Forum on Corporate Governance](#))

- Gives everyone a chance to share honest, helpful feedback, often in an anonymous way.
- Helps trustees understand their roles and how they differ from the library director's.
- Makes sure all trustees are aligned with the library's goals and mission.
- Looks at how the board is structured and how responsibilities are shared.
- Identifies areas that need more focus or improvement.
- Checks that the board reflects the diversity of the community it serves.
- Helps trustees feel valued, involved, and supported.
- Leads to clear action steps and timelines for improving how the board works.
- Builds in accountability so the board follows through on improvements.

Evaluating the board isn't about pointing fingers, it's about growing stronger together. It's a tool for learning, planning, and becoming an even better team.

See BoardSource's helpful resource on [successful board self-assessment](#) for more information on the process of assessing a board's strengths and areas of improvement.

How to Create a Helpful Board Assessment: A good board assessment gives honest feedback about how the board is doing and helps improve how it works. Here are some tips to design one that's useful and meaningful (adapted from the [American Hospital Association's Trustee Services](#) and [Harvard Law School's Forum on Corporate Governance](#)):

- **Keep it Current:** Don't re-use last year's assessment. If things have changed at the library, your questions should reflect that.
- **Set Goals Early:** Set board goals at the start of the year. Use those goals as the foundation for your assessment. Ask questions about progress and personal contributions.
- **Agree on What to Measure:** Work with the full board to decide what success looks like. If there's a governance committee, they can draft the survey based on this and share it with the board for approval.
- **Make it Anonymous:** Anonymous surveys lead to more honest feedback. Use online tools like Microsoft Forms or SurveyMonkey to keep responses confidential.
- **Ask Different Types of Questions:** Mix it up – yes/no, rating scales (like 1 – 5), and open-ended questions all give helpful insights.
- **Cover Key Areas:** Include questions on how the board works together, how it's structured, how effective it is, and if it reflects the community's diversity.
- **Include Self-Evaluation:** Ask trustees to assess their own contributions and set personal goals for the year ahead.

After the Assessment:

- The governance committee reviews the responses and prepares a summary report for the full board. Individual responses are kept private, especially if they could identify someone directly.
- Use the feedback gathered to guide next year's board goals and action steps.
- Consider holding short one-on-one meetings with trustees at the beginning of the year to:
 - Set personal goals
 - Offer support
 - Review their commitment to board service

Final Tip: Be Honest. The best thing you can do when filling out a board assessment is to be honest. Helpful feedback, both positive and constructive, is how boards grow and improve. Sugar-coating doesn't help anyone.

You can find a sample board assessment form, including self and peer review questions, in the *Sample Documents* of the [Appendix](#) section of this LibGuide.

Additional Resources:

- LibGuides at North Dakota State Library: [Board Self-Assessment - Public Library Board of Trustees](#)
- Pamela R. Knecht, American Hospital Association (AHA) Trustee Services: [Effective Board Culture: The Last Frontier](#)
- United for Libraries, American Library Association: [A Library Board's Practical Guide to Board Self Evaluation Self Evaluation](#)

Resources:

Board Development Section

- BoardSource. (Used with permission from www.boardsource.org. BoardSource is the premier resource for practical information, tools, and training for board members and chief executives of nonprofit organizations worldwide. For more information about BoardSource, visit <http://www.boardsource.org/> or call 800-883-6262. BoardSource © 2025. Content may not be reproduced or used for any purpose other than that which is specifically requested without written permission from BoardSource.)
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Introduction to the Library's Stakeholders

Public libraries thrive through the support and collaboration of a wide network of stakeholders. As a board trustee, it's essential to understand who these stakeholders are, what roles they play, and how they differ from the board's responsibilities. Internally, this includes library staff, library foundations, and Friends of the Library groups, each contributing in unique ways to the library's mission. Externally, stakeholders may include your library federation and its member libraries, local and state governmental entities, advocates, partners, and community organizations. This section explores these relationships, clarifies roles, and emphasizes the importance of community engagement. By understanding and nurturing these connections, you help ensure the library remains responsive, well-supported, and aligned with the needs of the people it serves.

Staff

Timothy Healy, former President of the New York Public Library, once said, “The most important asset of any library goes home at night – the library staff.” This powerful quote reminds us that while buildings, books, and computers are important, it’s the people who work in libraries that truly make them valuable to their communities.

Libraries offer essential services, programs, and resources that many people rely on every day. But none of this would be possible without the hard work and dedication of library staff. Whether a library has a large team or just a few employees, these individuals play a vital role in fulfilling the library’s mission and making a real difference in people’s lives.

As a board, you can show your support for the staff in your library in several meaningful ways:

- **Listen to their stories.** Encourage staff to share real-life examples of how the library impacts the community. These stories help you understand the value of their work.
- **Keep the Personnel Manual up to date.** This ensures staff have the guidance and support they need to feel confident and informed in their roles.
- **Support ongoing learning.** Give staff the chance to grow professionally, not just through workshops and conferences, but also by connecting with colleagues from other libraries.
- **Welcome staff feedback.** Provide safe and clear ways for staff to share their thoughts and experiences about the workplace.
- **Strengthen communication.** Make sure your library director has the tools to keep staff informed about important decisions, updates, and changes.
- **Take staffing concerns seriously.** When your library director raises issues about staff needs or challenges, actively listen and work together on solutions.

Library staff are the heart of the library. By supporting them, you’re investing in the future and success of the entire community.

Library Foundations

Library foundations have become essential partners in helping public libraries grow community support and strengthen their financial standing. These independent, nonprofit 501(c)(3) organizations are specifically created to raise private funds that support and expand the library's mission.

Unlike Friends groups, which typically focus on grassroots advocacy and small-scale fundraising, foundations are structured to pursue major gifts and high-impact fundraising campaigns. They give donors a trusted, tax-deductible way to invest in the library's future.

Libraries and foundations (and Friends groups!) should work in alignment to achieve and advance the library's goals. A partnership includes:

- **Shared Vision and Mission:** All partners work toward common goals and values.
- **Clearly Defined Roles:** Responsibilities are outlined in formal agreements, such as a Memorandum of Understanding (MOU).
- **Strong Partnerships:** Collaboration between the library foundation, director, and board of trustees is key.
- **Ongoing Communication:** Regular conversations helping to address both challenges and new opportunities.
- **Trust and Transparency:** Open communication, honesty, and mutual respect are essential.
- **Financial Transparency:** Clear reporting and accountability help build trust and keep everyone informed.

Library foundations are designed to raise major financial and in-kind contributions that go beyond a library's normal budget. These funds support efforts such as:

- Innovative programming
- Expanded services
- Special collections
- Capital projects (new buildings or renovations)

Common fundraising tools foundations use include:

- **Endowments:** Funds established to provide long-term financial support for the library.
- **Planned Giving Programs:** Includes bequests and charitable trusts designed to secure future donations.
- **Venture Capital:** Funding to test new ideas or expand library services.
- **Ticketed Events:** Events designed to raise both funds and the library's visibility in the community.

A foundation can help a library thrive by:

- **Receiving a Diversity of Private Gifts:** Includes cash, stocks, real estate, and life insurance, both restricted and unrestricted, for the library's use.
- **Accessing Grants for Nonprofit Organizations:** Foundations can apply for grants that are only available to nonprofit organizations if the library is not registered as a 501(c)(3) organization.
- **Offering Investment Flexibility:** Provides opportunities to grow and maximize donations that may otherwise be unavailable to the library.
- **Creating a Strong Fundraising Platform:** Ensures the long-term sustainability of the library through effective fundraising strategies.
- **Bringing in Fundraising Experts:** Experts who work with the library staff and trustees to connect donors with causes that resonate with them.
- **Reaching New Donors:** Expands the donor base beyond the traditional library community.
- **Raising the Library's Visibility:** Through foundation-led programs and events that increase community awareness.
- **Inspiring Donor Confidence:** Building trust, especially among donors familiar with giving to other nonprofits, by ensuring reliable stewardship and accountability.

Resources:

Library Staff and Foundations Section

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Who are the Friends of the Library?

Friends of the Library are community members who support their local library by raising funds, promoting awareness, and helping to improve services. Many libraries have a Friends group that works on both short-and long-term goals to help strengthen the library.

Most likely inspired by Andrew Carnegie's [legacy of supporting public libraries](#), Friends groups are independent nonprofits, separate from the library and its board of trustees. If the library is a nonprofit, 501(c)(3) organization, Friends groups still need their own tax-exempt status, which they can obtain through an [affiliate membership](#) with the Pennsylvania Citizens for Better Libraries ([PCBL](#)).

To operate properly, Friends groups must:

- Establish a working board of trustees to govern the nonprofit
- Follow Pennsylvania Nonprofit Law
- Pay sales tax on items sold
- Follow small games of chance laws and regulations
- Uphold the duties of care, loyalty, and obedience

According to the New York State Library's [Handbook for Library Trustees](#). Friends groups may:

- Encourage public support and awareness for the library
- Raise funds for projects and items not covered in the library's budget
- Advocate for increased library funding or legislation
- Sponsor library programs and events
- Volunteer for specific tasks requested by the library

Role Differences

It's important to clearly understand the different roles of the library board, library director, and the Friends of the library. While the Friends group supports the library, they have a separate role from the responsibilities of the board of trustees. See this adapted chart from the Connecticut State Library ([Working Together: Roles and Responsibilities Guidelines](#)):

Responsibilities	Library Board	Friends of the Library
General Administrative	Recruits, employs, supervises, and evaluates a qualified library director who manages the operations of the library.	Supports the library by fundraising, volunteering, and through advocacy efforts. Does not manage the staff, board, or library operations.
Policy	Develops and approves policies that govern library operations and supports the community.	Supports the policies adopted by the board of trustees.
Planning	Develops, approves, and monitors a strategic plan for the library.	Provides ideas for the library's long-term planning and goals, and assists in making them reality.
Fiscal	Legally responsible for making sure the library has adequate funding and for approving and overseeing the budget.	Raises funds to support the library, but doesn't control how the funds are spent. Manages the Friends' own budget separately from the library and covers its own expenses.
Advocacy	Promotes the mission of and advocates for the library	Promotes the mission of and advocates for the library.
Meetings	Participates in all board meetings and appoints a liaison to the	Maintains a liaison to the library board that does not serve as a board trustee of

Responsibilities	Library Board	Friends of the Library
	Friends' board that does not serve as a board member to this group.	the library. Conducts its own meetings separately from board meetings.
Networking	Joins the Pennsylvania Library Association (PaLA) to connect with other trustees.	Joins the Pennsylvania Citizens for Better Libraries (PCBL) to connect with other friends of libraries.

A Memorandum of Understanding (MOU) between the Friends of the library and the library board of trustees is an agreement that can help in defining each group's roles and responsibilities. When well-organized with a clear purpose, Friends groups can be a valuable part of the library team, supporting needs identified by the board of trustees and library director.

For a strong partnership, it's essential that everyone understands their role and communicates openly and often. Like any good friendship, this relationship takes effort but brings meaningful, lasting connections with the community.

Considerations

Boards can support the Friends of the Library in several helpful ways (adapted from the New York State Library [Handbook for Library Trustees](#)):

- **Create a written agreement** called a Memorandum of Understanding (MOU) to clearly outline the roles and responsibilities of both the board of trustees and the Friends group. A [sample](#) is available from United for Libraries.
- **Work with the library director and Friends group** to make sure their mission is clear and that members' skills are being used effectively.
- **Hold regular meetings** (every few months or twice a year) with the Friends board to plan and set shared goals.
- **Assign a library board member** to act as a liaison, someone who communicates between the board of trustees and Friends group without being part of their leadership.
- **Encourage open communication** and listen to ideas from the Friends group. They often have valuable insights about the community.
- **Have a yearly joint meeting** to review the library's goals, budget, and how the Friends group can support these efforts.
- **Show appreciation** for the Friends' time and contributions on a regular basis.

Additional Helpful Resources:

- Ontario Library Association: [Why Have Friends of the Library?](#)
- [Pennsylvania Citizens for Better Libraries](#)
- United for Libraries: [Organizational Tools for Friends Groups](#)
- United for Libraries: [Resources for Friends Groups](#)
- WebJunction: [Friends of the Library: Tools and Resources](#)

Resources:

Friends of the Library Section

- Carnegie Corporation of New York (2025). *Andrew Carnegie's Library Legacy: A Timeline*. Retrieved 2025, from <https://www.carnegie.org/our-work/article/andrew-carnegies-library-legacy/>
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Library Federation and Members

Library Federations (also called Library Systems) are comprised of two or more local libraries, usually within one county or several counties, that work together. In this type of structure, these libraries can share resources and provide better services to their communities than they could on their own. If your library is part of a federation, the way you work with the other member libraries and administrative unit are important. System agreements are often in place for these libraries so that all understand the roles and responsibilities of each of its members.

In a library system, member libraries may work together in the following ways:

- **Stronger Community Services:** Libraries work together to offer better programs, events, and access to more resources than they could alone.
- **Shared Resources:** Member libraries share books, materials, and technologies, giving patrons access to a wider range of resources and information.
- **Cost Savings:** Libraries save money by buying resources together and using shared tools like catalog software.
- **Collaborative Planning:** Libraries team up to solve problems, plan services, and respond to community needs together.
- **Staff Support and Training:** System-wide training and support help staff grow and improve library services.
- **Efficient Operations:** Collaboration in sharing best practices, policies, and expertise can help improve how libraries function and serve their communities.
- **Community Advocacy:** Libraries advocate together for public support.
- **Joint Funding Opportunities:** Working together, libraries can apply for funding that positively impacts their entire service community.
- **Data and Insights:** Usage data from across the library system helps libraries understand and better meet community needs.

Some challenges this type of structure can encounter include:

- **Different Priorities:** Each library has its own board, policies, and goals, which can make system-wide decision-making difficult.

- **Uneven Resources:** Funding, staffing, and community support can vary across the library system, leading to differences in what each library can offer.
- **Challenging Collaboration:** Making group decisions can be tough when member libraries have different needs and strategic goals.
- **Communication Gaps:** Keeping everyone informed and encouraging open, honest communication takes an ongoing effort.
- **Organizational Differences:** Each library may operate differently, which can make working together more complicated.

Governmental Entities

Libraries and local governments (including county government, municipality, township, or borough) need to build a strong, ongoing relationship. If a library only reaches out when it needs funding, it can miss out on being seen as a true community partner. When libraries are regularly involved in conversations with local leaders, they have the chance to share insights about the community that local officials might not see. This insight helps decision-makers understand how valuable the library is to its community as a trusted resource. A library that's well connected to its community and its needs can be viewed as a smart and meaningful investment. In fact, a [report](#) from the Aspen Institute found that both library and government leaders agree that libraries play a key role in education, creativity, and lifelong learning in their communities (summary available of the report [here](#)).

Local governments and officials support their libraries in many ways, and by doing so, they help strengthen their communities. They can:

- Provide funding for the library or levy a special library tax.
- Appoint people to serve on the library board.
- Hold property for the library.
- Use eminent domain (taking private property for public use) to help the library obtain land.
- Buy or lease land or buildings for library use.
- Help with shared services such as buying supplies, building maintenance, snow removal, and employee health benefits.

In many communities, local officials have to carefully manage their budgets and explain how public money is spent. It's important that as a board trustee you regularly advocate for your library and clearly show local officials how their funding supports valuable programs and services. Building strong, ongoing relationships with local officials is key to ensuring the library continues to thrive.

Here are some effective ways that the library can connect with local officials:

- **Speak at Public Meetings:** Share what the library is doing and ask for feedback on how it can better serve the community.

- **Set Up Visits with Supporters:** Bring library patrons, Friends group, and other community members to meet officials and share personal stories about how the library has helped them.
- **Stay in Touch Regularly:** Connect with local leaders frequently to keep them updated, but make sure to save requests for funding for just once a year.
- **Send Regular Updates:** Provide short, positive reports that show the library's value and success in serving the community.
- **Stay Informed and Involved:** Make sure the library staff and trustees are aware of local government decisions that could affect the library and maintain open communication.
- **Ask to Be on the Meeting Agenda:** Plan monthly presentations during municipal meetings to briefly highlight the library's recent achievements.
- **Make One Annual Funding Request:** Prepare a clear and persuasive request for financial support, backed by stories and data.
- **Show Appreciation:** Thank officials who support the library, either with a note, a public mention, or a personal thank you.

As a trustee, you hold a unique and powerful position. You represent the voice of the community in a way that a library director or a staff member simply cannot. While elected officials may see library staff as having a personal stake in funding decisions, your role is different – you're a community member, not a paid employee. That gives your voice added credibility. You can speak authentically about how the library impacts people's lives, what the community truly needs, and why continued support from local officials is essential. When you advocate for the library, you aren't just supporting an institution, you're championing the future of your community.

Advocates

Library advocates understand the value and importance of libraries, and communicate that value and importance to the community, government leaders, and other decision-makers. They play a key role in informing our communities about why libraries and librarians are essential in a society that needs access to reputable and trusted information. They can make a better case about the importance of funding libraries than library staff can because they have an outside interest that is not vested in the organization.

There are many organizations that act as advocates for libraries, including the [Public Library Association \(PLA\)](#), [EveryLibrary](#), and the [Pennsylvania Library Association \(PaLA\)](#). However, don't discount the importance of the grass-level power of individual community members who want to support the library locally. When they band together, great things for the library and community can happen!

Partners

Working with partners helps libraries do more for their communities than they could on their own. Partnerships bring in new ideas, share resources, and help the library reach more people. By working together, libraries and their partners can create stronger programs, avoid repeating efforts, and make a bigger impact.

Partnerships are a two-way street. While a partner may bring in tools, knowledge, or funding, the library can offer a trusted space and a strong connection to the community. Together, both sides benefit and so does the community.

Just about anyone who shares a common goal of helping the community can be a library partner, including:

- Schools and school districts
- Preschools and early learning centers
- Local government and public agencies
- Community and neighborhood groups
- Colleges and universities
- Historical societies and museums
- Other libraries
- Healthcare providers
- Technology experts
- Career and job centers
- Literacy councils
- Local businesses and chambers of commerce
- Economic development organizations

Many people and organizations don't immediately think of the library as a partner. That's why it's important for libraries to reach out and connect. Starting the conversation can lead to partnerships that truly make a difference.

Resources:

External Stakeholders Section

- Ashikuzzaman, MD. (2024).
 - *Benefits of Library Consortia: Why Library Consortia Are Essential*. LIS Education Network. Retrieved 2025, from <https://www.lisedunetwork.com/benefits-of-library-consortia-why-library-consortia-are-essential/>
 - *Library Collaboration Explained: What It Is and Why It Matters*. LIS Education Network. Retrieved 2025, from <https://www.lisedunetwork.com/library-collaboration/>
 - *Library Consortia: Meaning, Definition and Growth*. LIS Education Network. Retrieved 2025, from [https://www.lisedunetwork.com/library-consortia-mdg/Education Network](https://www.lisedunetwork.com/library-consortia-mdg/Education%20Network)
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- Doris Padgett Public Library. *Become a Library Advocate*. Retrieved 2025, from <https://www.sunnyvalepubliclibrary.org/supporting-the-library/become-a-library-advocate.html>
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Association). Retrieved 2025, from <https://icma.org/articles/press-release/icma-study-reveals-5-areas-where-public-libraries-can-support-community-goals>

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The Library's Service Community

A library's ability to reflect the community it serves is important. Gathering this data and information leads to better decision making, builds knowledge about changes and trends in the community's demographics, and ensures what the library provides aligns with the community.

There are many resources available for your library to access to create a picture of your service community. Here are several tools and data sources that can help you gather valuable information:

- **[PA Public Library Annual Data Survey](#)**
 - **What it is:** Each public library in Pennsylvania completes an annual report as a requirement for state aid funding.
 - **How it helps:** Use the data from your own library's report to learn more about your community and how your library serves it.
- **Community Profiles** from the Office of Commonwealth Libraries (OCL)
 - **What it is:** The OCL now has a subscription to [PolicyMap](#), a tool that can create a Community Profile for your library.
 - **What's included:** Information on local population, race, age, income, and more as a snapshot of your library's service area.
 - **How to get it:** Fill out the [Contact Us](#) form and select "Public Library Community Profile" from the drop-down menu.
 - **Want to see an example?** Check out a [sample Community Profile](#).
- **[American Community Survey \(ACS\)](#)**
 - **What it is:** A nationwide survey conducted by the U.S. Census Bureau.
 - **How it helps:** Offers detailed information on your local population and housing, and can be useful for community planning and grant applications.
- **Economic and Poverty Data Sources:** Explore how your community is doing economically.

- [Appalachian Regional Commission](#): Focuses on economic and quality-of-life data for the Appalachian areas of Pennsylvania.
- [Bureau of Labor Statistics \(BLS\)](#): National and local statistics on jobs, wages, inflation, and prices.
- [Internal Revenue Service \(IRS\)](#): Data on income tax returns, sorted by zip code.
- [Social Security Administration \(SSA\)](#): Information on Social Security recipients, earnings, and unemployment by area.
- [USDA Economic Research Service](#): Offers data on rural and small-town communities, farming, food access, and the environment.
- **Community Social and Educational Data**: Link social issues with library data possibilities.
 - [OpportunityInsights](#): Neighborhood and zip-code level data on economic mobility, social ties, and migration.
 - [Civil Rights Data Collection](#): Tracks school access, equity issues, and educational barriers from preschool through high school and provides school district-level profiles
 - [Environmental Protection Agency \(EPA\) Smart Location Database](#): Data on urban development, land use, access to jobs, schools, and healthcare.
 - [Migration Patterns](#): Discover where residents, especially young adults, are moving to and from.
- **Health-Related Data**: Learn about the health needs and risks in your community.
 - [Centers for Disease Control \(CDC\), Social Vulnerability Index,](#) and [PLACES data](#): Measures community health risks based on social and economic factors.
 - [Centers for Medicare and Medicaid Services](#): Offers insights into Medicare use and nursing home care needs.
 - [Health Resources and Services Administration](#): Identifies areas with health care provider shortages.
 - [Substance Abuse & Mental Health Services Administration \(SAMHSA\)](#): Data on mental health and substance use across age groups.

- [University of Wisconsin Center for Health Disparities Research](#): Explores neighborhood-level health inequalities.
- [University of Wisconsin County Health Rankings & Roadmaps](#): Compares your county's health to other areas nationwide.
- **Food Security and Nutrition Data:**
 - [Feeding America](#): Data on food insecurity, SNAP (food stamps) eligibility, and average meal costs.
 - [Reinvestment Fund](#): Identifies neighborhoods with limited access to healthy food options.
 - [US Department of Agriculture Food & Nutrition Service](#): Provides information on state-level participation in programs like WIC, which supports women and children in low-income families.

Another important way for a library to learn about its community is through active and intentional engagement. This topic is described in the next section.

What is Community Engagement?

For a library to truly serve its community well, it's important to connect with the people in it, including listening to their needs, hopes, and challenges. Community engagement is about more than just gathering input. It's an intentional and ongoing process of building relationships, learning from others, and working together to create lasting positive change.

[Penn State's Department of Agricultural, Economics, Sociology, and Education](#) notes that community engagement helps create sustainable outcomes by involving people directly in decisions that affect them. For libraries, this means stepping outside of the building and becoming an active part of community conversation.

The goal isn't for libraries to solve every issue alone. Instead, it's about being a partner, collaborating with others to understand the current reality and help shape a stronger, more resilient future. This requires being open-minded, letting go of assumptions, and being willing to act on what the community shares.

Strong community relationships, across all ages and backgrounds, help libraries design better services, write policies that keep community and libraries mission at the heart of the work, and plan strategically for the future. This kind of meaningful connection can't happen from behind a desk. It means showing up, listening, and creating space for honest dialogue.

Engaging with the community helps libraries grow alongside the people they serve. It builds trust, ensures the library's relevance to the community, and supports long-term success for everyone.

Benefits

There are many benefits and opportunities that arise from a library engaging with their community. Some benefits include (Adapted from [Penn State](#), [Library Journal](#), and [The Harwood Institute](#)):

- Helps the library understand community needs, concerns, and barriers.
- Encourages collaboration and breaks down silos between individuals, groups, and organizations.
- Supports open, respectful dialogue, even on difficult topics.
- Increases community buy-in for new programs and solutions.
- Inspires community members to actively participate in solving issues.
- Leads to more practical, effective solutions by involving those directly affected.
- Broadens perspectives as the library and community learn from each other.
- Gives voice to underrepresented community members and builds their connection to the library.
- Strengthens relationships and builds local networks.
- Creates ongoing opportunities for learning, listening, and connection.
- Uses community feedback to drive meaningful change.
- Community becomes the reference point for decision-making and moving forward.
- Builds trust between the library, partners, and the community.

Ways to Engage

There are many ways libraries can build strong relationships with their community, partners, and local organizations. From social media to public meetings, surveys to small group discussions, engagement doesn't have to be complicated. Here are some practical ideas and helpful resources:

- **Create a Community Engagement Plan:** A plan helps guide your efforts and keep things focused. The American Library Association (ALA) and The Harwood Institute offer a great [step-by-step guide](#) through their [Libraries Transforming Communities \(LTC\)](#) initiative. [The Harwood Institute](#) also has additional tools to help libraries get started.
- **Explore Tools for Engagement:** The [Tamarack Institute](#) offers a useful [list of engagement methods](#), focusing on informing, involving, collaborating, and empowering, along with tips for when and how to use each method effectively.
- **Ask the Right Questions:** Focus on learning about your community, not just the library's role. Use questions like: (adapted from [Inspiring Communities](#))
 - What makes this a great place to live?
 - What matters to you?
 - What's working well, and what needs to change?
 - What opportunities or assets do you see in the community?
 - How would you like to be involved and how can we work best together?

You can find [more engaging questions](#) on the Inspiring Communities website.

- **Try Community Mapping:** Also known as asset mapping, this activity helps visualize local strengths, such as resources, organizations, and individual skills. This [toolkit](#) from Rethink the Village can guide you through the process.
- **Practice Active Listening:** You don't need to have all the answers. Just listening openly and authentically builds trust. Inspiring Communities has great tips on developing [active listening](#) skills.
- **Follow Up and Share Back:** After gathering feedback, share what you've learned with the community and your partners in the effort. Let them know how their input will shape

the library's future plans. While the library can't solve every issue, it can be part of meaningful change.

Resources:

Community Engagement Section

- American Library Association.
 - *Turning Outward Resources for Libraries*. Retrieved 2025, from <https://www.ala.org/tools/librariestransform/libraries-transforming-communities/resources-for-library-professionals>
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- Preston Community Council. *The Community Mapping Toolkit*. Retrieved 2025, from https://www.rethinkthevillage.org/sites/default/files/2020-08/Community%20Mapping%20Toolkit_A%20Guide%20to%20Community%20Assessment.pdf
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- Tamarack Institute. *Index of Community Engagement Techniques, Organized by Engagement Level: Inform, Consult, Involve, Collaborate, Empower*. Retrieved 2025, from <https://cdn2.hubspot.net/hubfs/316071/Resources/Tools/Index%20of%20Engagement%20Techniques.pdf>

Introduction to Other Helpful Resources

You don't have to navigate your responsibilities as a board trustee alone! There are many valuable resources and organizations available to support your work. From your district library center, local libraries, federal administrative units, and the Office of Commonwealth Libraries, these entities can provide advice, guidance, training, and tools to help you govern your library effectively. Professional organizations such as the Pennsylvania Library Association (PaLA), Pennsylvania Citizens for Better Libraries (PCBL), and the Pennsylvania Association for Nonprofit Organizations (PANO) also provide essential advocacy, education, and networking opportunities. This section outlines these resources and how you can access them, empowering you with the knowledge and support you need to succeed in your role as a trustee.

Your District Library Center

Your district library center (DLC) is a valuable support system for your library. It offers extra assistance, coordinates services, and offers advice and expertise to your library and others in your district.

As a board trustee, you can turn to your district consultant or district administrator for guidance. They can assist with areas such as:

- Choosing and managing books and materials
- Library security and space planning
- Reviewing and advising on budgets and fiscal management
- Reporting and data collection
- Bylaws and board trustee recruitment
- Developing library policies
- Following nonprofit best practices

You may also have the chance to take part in district-wide training events or join district advisory council meetings, where you can learn about important issues and trends affecting libraries across Pennsylvania, and what your district library center is doing to support the member libraries.

To learn how your district library center supports your library, talk with your library director. You can also explore the [District Library Center LibGuide](#), which explains the [common responsibilities of your district consultant](#) and other key information. Reviewing your District Negotiated Agreement (DNA) is another great way to understand the DLC's role and responsibilities.

Federated Administrative Unit

If your library is a member of a Federated system, the System Administrator and member libraries can be a great support network for your library.

Here are some examples of that type of support:

- Policy development and suggestions
- Discussing trends in your library system's service area
- Discussing issues affecting your community to find possible solutions
- Attend meetings together where support can be provided

Local Libraries

Other local libraries near your library may be an avenue of support your library.

This can include:

- Discussing trends in your local region
- Advice on various library issues and questions
- Discussing issues affecting your community to find possible solutions
- Visiting local libraries to support and learn from each other

Resources:

Local Library Assistance Section

- Bureau of Library Development - Office of Commonwealth Libraries (2025).
 - *Home - District Library Center Guide*. LibGuides at the State Library of Pennsylvania. Retrieved 2025, from <https://pa.gov.libguides.com/districtlibrarycenter/home>
- Commonwealth of Pennsylvania - Department of Education - Office of Commonwealth Libraries. *Getting on Board! Tools for Board Development and Assessment*.
- *Pennsylvania Consolidated Statute, Title 24, Education, Chapter 93 Public Library Code, §9314. District Library Centers*. Retrieved 2024, from <https://www.pa.gov/content/dam/copapwp-pagov/en/statelibrary/documents/for-libraries/library-laws-and-regulations/pennsylvanialibrarylaws.pdf>

Pennsylvania Library Association

The [Pennsylvania Library Association \(PaLA\)](#) is a statewide organization that supports libraries and the people who work in them and support them. This includes library staff, board trustees, and friends of the library groups. PaLA helps libraries grow by offering ways to connect, share ideas, and learn from each other. It also encourages leadership, teamwork, and new ideas in the library community.



Some of the ways PaLA supports libraries include:

- Local workshops and events
- A leadership training called PALS (Pennsylvania Library Association Academy of Leadership Studies)
- An online conference for frontline library staff
- An annual statewide conference
- A special program for new library directors
- A mentorship program to guide and support library professionals

Pennsylvania Citizens for Better Libraries

[Pennsylvania Citizens for Better Libraries \(PCBL\)](#) is a membership organization for anyone to join if they care about having strong, well-funded libraries across the state. This includes library users, staff, board trustees, government leaders, and friends of the library. The goal is to ensure all Pennsylvanians have access to libraries that are well-funded and provide the best possible library services.



Here's how PCBL helps:

- They keep members informed about laws and government actions that affect libraries in Pennsylvania.
- They offer workshops on how to support and raise funds for libraries, including online sessions for friends groups and board trustees.
- They share updates about events, programs, and important library-related issues.

Pennsylvania Association of Nonprofit Organizations

[PANO \(the Pennsylvania Association of Nonprofit Organizations\)](#) is a statewide membership organization that helps support the many nonprofit organizations that serve people across Pennsylvania. By joining PANO, members become part of a statewide and national network that speaks up for and supports the nonprofit community, including libraries.



PANO helps by offering:

- Training and educational programs
- Advice and best practices
- Expert consulting advice
- Discounts on useful products and services
- Access to research and helpful information
- Support for public policies that benefit nonprofits
- Advocacy to make sure nonprofits have a strong voice

American Library Association

The [American Library Association \(ALA\)](#) is a national organization that helps improve libraries and supports the people who work in them. Its goal is to make sure everyone has access to information and learning. ALA brings together a community of people who care about keeping libraries strong and making them places of opportunity, learning, and inclusion.



ALA supports libraries by providing:

- Advocacy for libraries and library workers
- Updates on laws and policies that affect libraries
- Training, conferences, and leadership programs
- Resources that promote equity, diversity, and inclusion
- Support for intellectual freedom (the right to read and access information)
- Programs that support reading and literacy

Public Library Association

The [Public Library Association \(PLA\)](#) is the largest national association that supports public library workers. It's a division of the American Library Association (ALA) and focuses on helping library staff meet the changing needs of their communities. PLA works to make sure public libraries stay strong and valuable to the people they serve.



PLA supports public libraries by offering:

- Ongoing training and learning opportunities
- Programs and projects designed for public libraries
- Workshops and conferences for professional growth

United for Libraries

[United for Libraries](#) is a national group and division of the American Library Association of enthusiastic library supporters who believe that libraries are important in their communities. They believe libraries are vital places where communities can come together to learn, connect, and grow. By joining forces, these supporters can make a significant impact and speak up for libraries in powerful ways.



United for Libraries is responsible for:

- Educating library trustees so they can serve effectively and benefit both the public and their libraries
- Supporting the creation and growth of friends of the library groups and library foundations
- Sharing helpful information with trustees to improve library governance
- Providing friends groups and foundations with resources for fundraising, promotion, and operations
- Strengthening state and regional friends and trustee organizations
- Equipping all library supporters with tools to advocate at local, state, and national levels
- Raising public awareness of library supporting groups to encourage wider involvement in library advocacy

Many [organizational resources](#) are available from United for Libraries, including:

- Sample library director evaluations

- Resources to help libraries with role-defining between the library director, trustees, and friends groups
- Sample library policies
- Information about parliamentary procedures when conducting board meetings
- Resources to help you prepare for meetings with government officials and representatives

PA Library Staff Academy

The [PA Library Staff Academy](#) is an online learning platform made for people who work or volunteer in Pennsylvania libraries. It's hosted on Niche Academy, and offers training and resources to help library staff, library directors, board trustees, and volunteers grow their skills.

New content is added regularly, and topics include:

- Training for completing the library's Annual Report
- Resources for library trustees
- Managing and organizing the library's collections
- Engaging with the community
- Using data and marketing tools
- Library leadership and management
- Cataloging and technical services
- Programs and services for children and teens

Statewide Communications

The Compendium: OCL's statewide communications resource

[The Compendium](#) is a resource created by the Office of Commonwealth Libraries and the main way that staff share news, updates, and learning opportunities with libraries across Pennsylvania. You can also look up past articles by topic. To get updates sent to your email inbox, just enter your email on the Compendium website and click 'subscribe.'

Stay Connected with Pennsylvania Library Email Lists

You can subscribe to specialized email lists to receive updates, discussions, and resources relevant to your role in libraries. To find out which ones are right for you, and how to sign up, visit the [email lists page](#) on the POWER Library website.

As a trustee, the email lists that would most apply to you include:

- *PAMAILALL*: A general discussion list for all library types in Pennsylvania.
- *PA-TRUSTEE-TALK*: For public library trustees.
- *FOR-TRUSTEES-FROM-STATE-LIB*: A distribution list from the Office of Commonwealth Libraries to trustees.

Acronyms: Public Library Board Trustee Manual

These acronyms are adapted from resources used for the Board Trustee Manual, ABC CLIO's [Online Dictionary for Library and Information Science](#) by Joan M Reitz, and other resources noted in the Other Helpful Resources section of this LibGuide.

A

AASL: [American Association of School Librarians](#): A national division of the American Library Association (ALA) dedicated to school librarians and library programs.

ACRL: [Association of College & Research Libraries](#): The largest ALA division, supporting academic and research library professionals through programs, resources, and leadership development.

AI: [Artificial Intelligence](#): Technology that aims to make machines think and act like humans.

AL: [American Libraries](#): Magazine publication of the ALA.

ALA: [American Library Association](#): The world's oldest and largest library association, promoting library services, information access, and the librarianship profession.

ALSC: [Association for Library Services to Children](#): A national division of the ALA dedicated to the support and enhancement of library services to children.

APPLS: [The Association of Pennsylvania Public Library Systems](#): A professional membership organization to assist federated and consolidated library systems in the areas of planning, development, and funding.

ARC: Advanced Reader Copy: A preview version of a book sent out before publication to build early interest and reviews. Also known as a galley.

ARSL: [Association for Rural and Small Libraries](#): National library association representing and supporting rural and small library staff through advocacy, professional development, and elevating the impact of these libraries.

AUN: [Administrative Unit Number](#): A 9-digit number assigned by the Pennsylvania Department of Education (PDE) to identify local education agencies, including libraries. This is also known as the LIBID number.

B

BCBS: [Building Community-Based Summers](#): Learning sessions that help librarians listen

to marginalized voices and design summer programs that support and strengthen their communities.

BIBFRAME: [Bibliographic Framework Initiative](#): A project by the Library of Congress (LoC) to modernize how bibliographic descriptions of items are shared online and in networks using Linked Data.

BLD: [Bureau of Library Development](#): Bureau of the Office of Commonwealth Libraries (OCL) supporting libraries and library services for Pennsylvanians through the administration of state and federally funded programs and grant opportunities.

BSL: [Bureau of State Library](#): Bureau of the Office of Commonwealth Libraries (OCL) that is a statewide resource center and law library, providing Pennsylvania residents with PA State and U.S. Government documents, print materials, digitized collections, online reference services, and automated resources.

C

CCA: [County Coordination Aid](#): A form of [state aid](#) to be used to implement a plan for countywide library services for county residents, and guarantees that all residents of the county receive free library service.

CE: [Continuing Education](#): Ongoing learning for library staff through conferences, workshops, and other programs to stay current on library skills and trends.

CIPA: [Children's Internet Protection Act](#): Law that requires schools and libraries to block obscene or harmful online content for children if they receive discounts for Internet access or internal connections through the E-rate program.

CoPA: Commonwealth of Pennsylvania.

CSLP: [Collaborative Summer Library Program](#): A nonprofit, charitable organization that supports literacy, education, and science through summer reading events in public libraries across the country.

D

DAC: [District Advisory Council](#): Council of librarians and board trustees from district state-aided member libraries that review the district budget and help develop district plans, policies, services, and programs.

DEC: [District Executive Committee](#): Committee of library directors from member libraries of a district and does not replace the DAC.

DC: [District Consultant](#): Librarian at a District Library Center (DLC) that works closely with the OCL to coordinate the submission of reports and information, and supports the member libraries of their district in a variety of ways.

DLC: [District Library Center](#): A library designated by the State Librarian and Governor's Advisory Council on Library Development that receives state aid to make resources and services available for free to all residents and tax payers of its district service area.

DNA: [District Negotiated Agreement](#): A negotiated agreement between the DLC, district member libraries, and OCL that outlines how state aid will be used to provide district services.

DPLA: [Digital Public Library of America](#): A website that brings together digital collections from libraries, museums, and archives to make books, photos, and other materials easier for everyone to access online.

DRM: [Digital Rights Management](#): Technology that helps creators control how their digital content (such as books, music, or movies) is used, shared, or copied.

E

EdNA: [Education Names and Addresses](#): A database of schools and libraries used to ensure the state sends payments to the correct entities.

EIN/FEIN: Employer Identification Number/Federal Employer Identification Number: A 9-digit unique number identifier that is assigned to a business entity so that it can easily be identified by the Internal Revenue Service (IRS).

ESL: English as a Second Language: The teaching of English to people who speak a different language and who live in a country where English is the main language spoken.

F

FOIA: [Freedom of Information Act](#): A law that gives people the right to access government records, helping keep citizens informed and government transparent.

FTE: [Full-Time Equivalent](#): The total of the library weekly staff hours, divided by the number of hours in the library's standard work week (35 hours per week). This figure is reported on a public library's annual report to the Office of Commonwealth Libraries.

FTRF: [Freedom to Read Foundation](#): A nonprofit legal and educational organization affiliated with the American Library Association (ALA) that works to protect free speech and the right to access information in libraries.

G

GAC: [Governor's Advisory Council](#): A twelve-member council appointed by the Governor who advise and make recommendations to the Governor, the Secretary of Education, and the Deputy Secretary for Libraries regarding the State Library of Pennsylvania's policies and operations as well as Pennsylvania's system of aid to libraries.

H

HSLC: [Hosting Solutions & Library Consulting](#): A resource for academic, public, school, and specialized libraries that help these libraries succeed by providing technical support and expert advice.

HTML: Hypertext Markup Language: The basic language used to create webpages and organize the content, telling the Internet browser how to display the content.

I

IDS: [Interlibrary Delivery Service of Pennsylvania](#): A service that helps libraries across Pennsylvania share materials quickly and affordably.

ILL: [Inter-Library Loan/Inter-Library Lending](#): A service where libraries borrow or lend items to each other so that patrons can obtain materials their own library doesn't have.

ILS: [Integrated Library System/Integrated Library Software](#): A software system that helps libraries manage their materials, orders, patrons, and payments. It usually includes interfaces for both library staff and patrons to use.

IMLS: [Institute of Museum and Library Services](#): A government agency that supports museums and libraries in the U.S. by giving grants, conducting research, and policy development so these institutions can grow and better serve their communities.

ISBN: [International Standard Book Number](#): A unique number used to identify books, whether they are printed or digital.

ISP: Internet Service Provider: A commercial or nonprofit organization providing Internet connections to individuals and organizations.

ISSN: [International Standard Serial Number](#): A unique number used to identify magazines, journals, and other serial publications, in both print and digital formats.

J / K

L

LAMP: [Library of Accessible Media for Pennsylvanians](#): A statewide program that provides books and other materials in accessible formats, such as digital, Braille, large-print and Audio-described DVDs, for Pennsylvanians who are unable to read regular print. Run by the Carnegie Library of Pittsburgh and the Free Library of Philadelphia, LAMP also offers reading help and outreach services across Pennsylvania.

LoC: [Library of Congress](#): The largest library in the world, with millions of items such as books, movies, music, photos, newspapers, and maps. It supports the U.S. Congress with research and also manages the U.S. Copyright Office.

LCSH: [Library of Congress Subject Headings](#): A system used by libraries around the world to organize and label topics in books and other materials. Created by the Library of Congress in 1898, LCSH helps people find what they're looking for more easily with subject headings.

LibPAS: Library Performance Assessment System: A software product used by libraries in Pennsylvania to collect and report data, such as the annual report and other various reports submitted to the OCL throughout the year. The information submitted helps determine libraries' eligibility for state aid, contributes to national library statistics kept by the IMLS, and gives libraries useful data to compare and improve their services.

LFE: [Local Financial Effort](#): The amount of local funds expended by the library and is reviewed when determining eligibility for state aid.

LJ: [Library Journal](#): A magazine published by the American Library Association (ALA) that supports libraries by sharing ideas, resources, and trends in libraries and the library profession.

LMS: Learning Management System: A software tool that helps libraries create, share, and manage training courses, lessons, and quizzes. An LMS can help libraries deliver training materials to staff and others quickly and efficiently.

LSTA: [Library Services and Technology Act](#): A federal program that gives funding to states to support libraries through its Grants to States Program. In Pennsylvania, these funds are managed by the Office of Commonwealth Libraries and help support local and statewide programs in public, school, academic, and special libraries, based on a five-year plan approved by the Institute of Museum and Library Services (IMLS).

LTC: [Libraries Transforming Communities](#): An initiative of the American Library Association (ALA) that helps libraries become stronger community leaders. It gives library staff tools and support to connect with their communities in new and meaningful ways.

M

MARC: [Machine-Readable Cataloging Record](#): A format that lets computers read and share information about library items, such as what's found on a card catalog, and helps libraries organize and exchange records more easily.

MLIS/MLS/MIS: Master of Library and Information Science: (Also referred to as Master of Library Science and Master of Information Science). A graduate degree that prepares people to work in libraries and other information-related jobs. It teaches the skills, knowledge, and ethics needed to help manage and share information in ways that support communities and society.

MOU: Memorandum of Understanding: A non-binding agreement that states each party's intentions to take action, conduct a business transaction, or form a new partnership.

N

NLM: [National Library of Medicine](#): The world's largest medical library that provides access to a large collection of health and health science information, supports research, and provides grants to public libraries that help patrons find reliable health information.

NLS: [National Library Service for the Blind and Print Disabled](#): A national library program run by the Library of Congress that provides Braille and audio books to people who are unable to read standard print. These materials are shared through a network of local and regional libraries. IN Pennsylvania, this service is called [LAMP](#) (Library of Accessible Media for Pennsylvanians).

O

OCL: [Office of Commonwealth Libraries](#): A department within the Pennsylvania Department of Education (PDE) that operates a major research library and collects, preserves, and connects state government, libraries, and all residents with the information and resources needed for education, enrichment, and advancement.

OCLC: [Online Computer Library Center](#): A worldwide organization that helps libraries share resources, use technology, and access information more easily. OCLC also does research and supports library communities.

ODLIS: [Online Dictionary for Library and Information Science](#): A website that provides definitions and explanations of terms used in libraries and information science made for both library staff and library users.

OPAC: Online Public Access Catalog: A searchable online bibliography of a library's

collection that is available to the public, and is usually accessible across the world.

P

PaLA: [Pennsylvania Library Association](#): Pennsylvania's oldest professional library organization serving libraries, library employees, library trustees, and friends of the library groups.

PaLA CRD: [Pennsylvania Library Association's College & Research Division](#): A division of PaLA that focuses on academic libraries across the state.

PaLA PLD: [Pennsylvania Library Association's Public Library Division](#): A division of PaLA that focuses on public library services.

PaLA YSD: [Pennsylvania Library Association's Youth Services Division](#): A division of PaLA that focuses on youth services and programs in libraries.

PALSA: [Pennsylvania Library Staff Academy](#): A curated catalog of e-learning opportunities tailored to support the continuing education needs of library staff, administration, trustees, and volunteers across the Commonwealth.

PANO: [Pennsylvania Association of Nonprofit Organizations](#): A statewide membership organization that supports nonprofits in Pennsylvania by offering training, advice, resources, and discounts to help them serve their communities better.

PDE: [Pennsylvania Department of Education](#): The PDE oversees school districts and schools across the Commonwealth as well as policies related to public, academic, and school libraries, and the State Library of Pennsylvania.

PLA: [Public Library Association](#): A division of the American Library Association (ALA) and the largest association dedicated to supporting public library staff by providing support, resources, and training.

PLS: [Public Libraries Survey](#): A yearly report that shows how public libraries across the U.S. are changing to better serve their communities. The information helps library leaders and government officials make smart choices about planning library services and funding.

POWER Library: [Pennsylvania Empowered by Our Libraries](#): An online resource provided by the Office of Commonwealth Libraries (OCL) that gives Pennsylvanians access to digital materials and a statewide database of library catalogs.

PSLA: [Pennsylvania School Librarians Association](#): A professional organization for school library professionals and library educators, working to improve and promote strong library programs in schools.

Q

R

RDA: [Resource Description and Access](#): A set of rules and guidelines used to create descriptions of library and cultural resources, making sure the information is organized in a way that works well for users and fits global standards for sharing data.

RFID: [Radio Frequency Identification](#): A technology that uses radio waves to automatically track and identify library items making checkouts and returns of these items faster and easier.

RFP: [Request for Proposal](#): A document used by libraries to ask for offers from companies to buy products or service that clearly explains the library's needs and goals, encouraging vendors to submit competitive proposals.

S

SALSA: [State Aid Library Subsidy Application](#): The application public libraries and federated systems use to apply for Quality and Incentive for Excellence categories of state aid from the Commonwealth of Pennsylvania.

STEM/STEAM/STREAM/STEMM: Science, Technology, Engineering, Mathematics (also can include Art, Reading, wRiting, and Music): Programs that teach students to think creatively and solve real-world problems using science, technology, reading, writing, engineering, art, mathematics, and music. These programs help students build critical thinking skills and encourage innovation and creativity.

SWOT: [Strengths, Weaknesses, Opportunities, and Threats](#): A tool libraries use to evaluate what they do well, areas to improve, new possibilities for growth, and challenges or outside factors that could affect them. This tool helps libraries make better decisions and strategically plan for the future.

T

TIMS: [Teacher Information Management System](#): An online platform where teachers and librarians in Pennsylvania can apply for their teaching certification, manage their personal information, and track their certification status. The PA Department of Education Division of Certification Services oversees certification qualifications.

U

UEI: Unique Entity Identifier: A 12-digit ID given to businesses and organizations that register with the federal government through [SAM.gov](https://sam.gov). It replaces the old DUNS number and helps identify agencies doing business with the government.

UFL: [United for Libraries](#): A division of the American Library Association (ALA), and considered the association for library trustees, friends and foundations that support libraries.

ULC: [Urban Libraries Council](#): An organization connected to the American Library Association (ALA) that brings together library leaders to share ideas and strategies. Their programs focus on urban libraries, improving libraries and communities, supporting modern learning, a strong economy, and active participation in democracy.

V

VAC: [Verification of Actual Costs](#): An annual report supporting document to verify amounts paid by a municipality on behalf of a public library.

VESC: [Verification of Estimated Shared Costs](#): An annual report supporting document verifying the cost of services or items used in cases where those services or items are shared with a municipality or other agency.

VPN: Virtual Private Network: A secure connection that lets someone access the internet or a network safely by encrypting the data and helps protect information from being seen or stolen while online.

W

WAFL: [Waiver Assessment for Libraries](#): A document that determines whether or not a library needs to apply for a waiver of standards.

X/Y/Z

YA: Young Adult: A short term used by library staff for ‘young adult.’

YALSA: [Young Adult Library Services Association](#): A division of the American Library Association (ALA) that helps libraries provide services and programs to support teens in their education and career preparation.

Library Terminology for Board Trustees

These terms are adapted from resources used for the Board Trustee Manual, ABC CLIO's [Online Dictionary for Library and Information Science](#) by Joan M Reitz, and other resources noted in the Other Helpful Resources section of this LibGuide.

A

Access: The ability for someone to enter a library and use its resources. Public libraries and many academic libraries in the United States allow anyone to visit and use the library's main collections, however some areas or resources may have restrictions or require permission to access or use. For more details, see the American Library Association's resources on [access to library resources and services](#).

Accessibility: How easy it is for someone to use the library, including being able to enter the library or access its digital resources, find and use materials, and obtain the information they need, no matter the format.

AccessPA: A shared [interlibrary loan program](#) of the Pennsylvania Department of Education (PDE) and Office of Commonwealth Libraries (OCL), providing access to a catalog with 7.3 million titles and nearly 39 million items. More than 800 libraries in PA (including public, school, academic, and special libraries) take part in this program to lend and borrow materials.

Accreditation: A process where the Committee on Accreditation (COA) of the American Library Association (ALA) reviews and approves library and information science graduate programs to ensure they meet their [Standards of Accreditation of Master's Programs in Library and Information Studies](#). See ALA's list of [accredited library school programs](#) for obtaining a master's degree in library science.

Accredited Program: A library and information science degree program reviewed and approved by the ALA for meeting or exceeding the [Standards of Accreditation of Master's Programs in Library and Information Studies](#). See ALA's list of [accredited library school programs](#) for obtaining a master's degree in library science.

Acquisitions: The process a library uses to choose, buy, and receive materials, either by purchasing them or through donations. For more information, see the American Library Association's resources on [acquisitions procedures](#).

Act 48: [Pennsylvania act](#) requiring all educators that have a public school certification to complete ongoing professional development every 5 years to maintain their certification.

Adult Services: Materials, services, and programs created to support the needs and interests of adult library users. See the American Library Association's examples of [types of adult services](#) provided by public libraries.

Advance Order: When a library orders a new item before it is officially published, often because it was promoted ahead of time or requested by a library patron.

Advisory Board: Appointed by a local governing body (such as a borough, county, or township) to represent the community by advising the library director and leadership. Members support the library by sharing expertise, promoting its services, making personal donations, and strengthening community connections. The level of authority an advisory board holds can vary, and some may assist with strategic planning, policy approval, and leadership decisions depending on local governance.

Advocacy: Supporting the library in securing public funding and resources to ensure it can continue to serve the community. Advocacy also involves encouraging library supporters to help spread the word about the library's value. See the Public Library Association's resources on [advocacy](#).

Advocacy Plan: A thoughtful strategy to help promote and support the library's mission, and includes activities like lobbying, educating the public, and researching community needs. The goal is to make sure the library has the support it needs to continue serving the community effectively.

Advocates: Library advocates understand the value and importance of libraries, and communicate that value and importance to the community, government leaders, and other decision-makers.

Agenda: A list of topics to talk about during a meeting. The person leading the meeting may ask attendees for input ahead of time. An agenda is usually shared before a meeting so everyone knows what to expect and can come to the meeting prepared. See this article from Harvard Business Review on [effective agenda setting](#).

ALA Code of Ethics: A set of values and ethical guidelines from the American Library Association to help librarians, library staff, and information professionals make decisions and perform their role responsibly. See [ALA's Code of Ethics](#) for the full statement.

American Library Association (ALA): A national organization that helps improve libraries and supports the people who work in them. Its mission is to ensure everyone has access to information and learning. [ALA](#) brings together a community of people who care about keeping libraries strong and making them places of opportunity, learning, and inclusion.

American Association of School Librarians (AASL): [AASL](#) is a national division of the American Library Association (ALA) dedicated to school librarians and library programs.

Annual Meeting: This special board meeting is usually held once a year and can include a review of the board's bylaws and policies, electing new board officers and new trustees, reviewing the past year's activities, and highlighting goals for the upcoming year.

Annual Report: A yearly summary that shares what the library did over the past year and its

financial status. In Pennsylvania, this refers to the [PA Public Library Data Survey](#), which all public libraries that receive State Aid must complete and submit. It also refers to part of a [new reporting requirement effective in 2025](#) that qualifying nonprofits in Pennsylvania must file annually to the Department of State.

Appeal Letter: A persuasive letter that asks someone to donate to the library. It explains how their support will help the library and highlights the positive impact their gift can have.

Articles of Incorporation: Official papers filed with the government to legally create a corporation or organization.

Audiobook: A recorded version of a book you can listen to. It can be read aloud by a professional narrator, an actor, or the author. They can be enjoyed on CDs, downloaded, or streamed through apps, and are often available for free through a local library. See this article from BookRiot about [listening to audiobooks](#).

Audit: An official check of a library's financial records to ensure everything is accurate and properly managed. The individual completing the audit (the auditor) is required to obtain independent confirmation and verification of the financial information examined. The Office of Commonwealth Libraries requires public libraries to have [audits or financial reviews](#) completed to qualify for receiving State Aid.

Autobiography: A book someone writes about their own life, usually telling their story in the order events took place. It often focuses on the most important or interesting events and may be written with help from a ghostwriter (someone who writes it for them).

B

Banned Book: A book that's been removed from shelves or not allowed to be sold or shared because some people believe its content is offensive, harmful, or inappropriate, [often for political or social reasons](#). In the United States, [Banned Books Week](#) is held every year to raise awareness, and many libraries share lists of books that have been banned.

Barcode: A label with a series of lines that a scanner can read to quickly identify something. In libraries, barcodes are used to keep track of items, and to connect a patron's library card to their account in the integrated library software (ILS).

Basic Literacy: The essential skills people need for everyday life, including reading, writing, math, and completing job applications. It can also include learning basic science, technology, engineering, and math (STEM) skills. See the Pennsylvania Library Association's [PA Forward website](#) for more information on this type of literacy.

Bestseller: A book that is very popular and in high demand, with many copies being sold and borrowed from libraries. Newspapers and magazines often publish lists of bestsellers, ranking books by how many copies are sold in a certain period. To see an example, see

this bestsellers list from [*The New York Times*](#).

Bibliographic Record: A listing in a library catalog or database that provides all of the important details about a specific item. It includes information such as the title, author, and publisher, and is formatted in a way that can be read by computers. The most common format is [machine-readable \(MARC\)](#).

Biography: A detailed story about someone's life, based on research, and written by someone else.

Board Book: A sturdy book made for young children, with thick pages, colorful pictures, and few words and short text.

Board Committee: A board committee focuses on specific issues, provides recommendations, and reports back to the full board of trustees. They do not make decisions on behalf of the entire board but do play a key role in moving the library forward.

Board Meeting: A formal meeting where the library's board of trustees discusses important issues, reviews the performance of the library, approves library policies, and makes decisions about the library's future.

Board President: The leader of the board of trustees and the main contact between the board of trustees and the library director. The board president provides support to the library director and keeps the board informed on important library issues.

Board Secretary: Keeps accurate minutes of the board meetings, ensures the minutes and agenda are shared with the board of trustees on time, and ensures approved minutes are kept on file. The board secretary may also handle other tasks and, in some libraries, may be a combined role with the board treasurer.

Board Treasurer: Oversees financial records, reports, and transactions. In smaller libraries, the treasurer may handle day-to-day finances, while in larger libraries, they ensure financial matters are properly managed. The treasurer should be bonded to protect against fraud or theft.

Board of Trustees: The governing body of a library, responsible for overseeing the library director and the library's operations. They create and approve policies, plan for the future, ensure the facility is safe and accessible for the community, and approve the budget for the library.

Board Trustee / Board Member: Member of the governing body of a library.

Board Trustee Orientation: An opportunity that helps new board trustees understand their role and learn important information about how the library operates.

Board Vice President: Fills in for the board president when needed and handles other

duties assigned by the board. While this role is not legally required, the board vice president supports leadership continuity.

Bonding (of Treasurer): A bond is a guarantee that the treasurer will follow all local, state, and federal laws, as well as ethical guidelines while in their role. It serves as insurance for the library, protecting its assets and ensuring responsible financial management.

Book Challenge: When someone attempts to remove or limit access to a library book because they find it offensive or inappropriate. For more information on book challenges, see information about [banned and challenged books](#) from the American Library Association.

Book Drop: A bin, box, or slot where people can return library items, especially when the library is closed. Book drops can be located outside the building, built into a wall, or part of a library's service desk.

Booklist: A [magazine for librarians](#), published by the American Library Association, that reviews books and other resources for all ages. It also features articles, author interviews, reading lists, and helpful tips for library staff. For more information, see the [American Library Association's description](#) of the journal.

Bookmobile: A large van or bus that carries books and other library materials that acts as a mobile library, bringing library services to neighborhoods and communities.

Book Sale: Libraries often hold book sales to sell old, donated, or no longer needed items. These sales are sometimes run by friends of the library, and the funds raised help support library programs and services.

Borrower: Someone who checks out items from the library. To do this, most libraries require users to sign up for a library card, which gives them borrowing privileges. Libraries may use differing terms for a borrower. See this article from *Public Libraries Online* about the [varying terms](#) libraries use to describe their borrowers.

Branch: An outlet of a local library, managed by a central library and governed by the central library's board of trustees, and must offer free access to everyone in its service area. The branch must operate in its own separate space from the central library, have an organized collection of library materials, paid staff, and be open on a regular schedule of hours to the public.

Branding: Connecting the library with a logo, slogan, image, or phrase that makes it easily recognizable. It helps the community instantly associate these visuals or words with the library. A well-designed tagline or logo creates a consistent, memorable message that people remember. See this [article](#) from *Public Libraries Online* on how taglines and logos help shape a library's brand.

Broadband: A high-speed way to connect to the internet, much faster than older dial-up

connections, and can use cable, DSL, or wireless networks. See the Commonwealth of Pennsylvania's [Broadband program \(BEAD\)](#) for more information.

Browse: To casually look through books, catalogs, or online tools to find something of interest, even if you aren't sure what you are looking for. Some [libraries](#) choose this way of organizing items instead of using the Dewy Decimal System.

Budget/Budgeting: A plan and process that shows an estimate of how much money (income) a library expects to have and the plan for how it will be spent (expensed) over a period of time. It acts as a roadmap, helps the library make the best financial decisions possible, and allows the library to evaluate and adjust along the timeframe of the budget to ensure funds are allocated effectively.

Bureau of Library Development (BLD): The [BLD](#) in the Office of Commonwealth Libraries supports libraries and library services for Pennsylvanians through the administration of state and federally funded programs and grant opportunities. BLD also provides advisory services, professional development, and continuing education for library staff at public, school, academic, and special libraries.

Bureau of State Library (BSL): The State Library of Pennsylvania's main role is to gather, preserve, and share materials related to Pennsylvania. It serves the state government, libraries, and the public by providing access to its large collection of over a million books, newspapers, and government documents. The library also offers online resources, acts as one of four Statewide Resource Centers, and provides quick access to collections from other major libraries in Pennsylvania and worldwide.

Bylaws: Bylaws are a set of rules that guide how a library's board operates and how its trustees govern the library. These rules are legally required for nonprofit organizations in Pennsylvania ([15 Pa. C.S. §5310\(a\)](#)) and should be reviewed and updated regularly as needed.

C

Calendar Year: The one-year period beginning on January 1 and ending on December 31.

Call Number: A special code on a label usually found on the spine of a library book. It helps library users and library staff find an item on a shelf, and shows where it belongs in the library. Each item has its own call number. See this [resource](#) from Sunnyvale Public Library explaining call numbers.

Capital Expenditure: Funds set aside for large, one-time costs, such as building a new library facility, renovating space, or purchasing major technological upgrades. This type of expenditure differs from the regular yearly budget that covers everyday expenses such as staff salaries and utilities. See [Title 22 under Chapter 131, General Provisions of State Aid, §](#)

[131.60](#) for more information on Capital Expenditures.

Capital Improvement: A large, one-time purchase or upgrade that will last a long time. Capital improvements are paid for with capital expenditure funds, not from the regular operating budget used for day-to-day expenses.

Catalog: A list of all the items a library makes available to patrons. Most catalogs are online and can be searched by title, author, subject, or keyword.

Cataloger: A librarian who organizes information about the items available at the library to ensure they are accessible to patrons. They create records in the catalog that help locate materials by adding details like the title, author, subject, and where to find it on the shelf. See this American Library Association journal [article](#) describing the role of a cataloger.

Cataloging: Creating records in the library catalog that help users locate materials.

Censorship: When someone tries to remove or block access to items in a library. This usually happens when a person or group believes the content is inappropriate, harmful, or offensive.

Census: An official count of how many people live in a certain area, along with other information such as age, race, housing, and other demographic data. In the U.S., the federal government (U.S. Census Bureau) conducts a [national census](#) every ten years to collect this data.

Central Library: A public library location designated by a Consolidated Administrative Unit or Federated Administrative Unit to have branch locations. All locations in this structure are governed by one board of trustees and must offer free access to everyone in their service area. The Central Library is responsible to meet the standards of an Independent Library for the Consolidated System.

Challenge (to a library item): When someone complains about an item in the library and requests that it be removed from the collection. This can be done by one person or a group who feels the material is not appropriate. See this [article](#) from the American Library Association on the most effective ways for libraries to respond when a challenge to an item occurs.

Charter: A document that outlines what your team or group is trying to achieve, what resources you have available, and any limits you need to work within. It's usually created together as a team, so everyone agrees on the goals and how the team will work together. See this helpful article from the [Center for Creative Leadership](#) on charters.

Checked Out: When an item is checked out, someone has borrowed it from the library and will return it by its due date at the end of the loan period.

Check-In: The process of recording when a library item is returned by a borrower so that it is

ready to be borrowed by someone else.

Children’s Book Week: A special event held every November to celebrate books and reading for children. During this week, librarians, booksellers, and teachers host fun events and activities to encourage young people to read more. See the [CBW website](#) for more information.

Children’s Internet Protection Act (CIPA): [Legislation](#) passed by Congress in 2000 to address concerns about children’s access to obscene or harmful content on the internet.

Children’s Librarian: A [librarian](#) who specializes in providing services, programs, and collections for children.

Children’s Services: Library programs and resources intended for children up to the age of 12 or 13, including collection development for children and planning programs. See the [Association for Library Service to Children \(ALSC\)](#) website for more information.

Circulation: The process of borrowing and returning items at the library. It can also mean the total number of items checked out during a certain period of time, or how many times a specific item is borrowed in a year. See this [article](#) from *Public Libraries Online* on the circulation of items.

Circulation (“Circ”) Desk: Desk usually near the library exit where items can be returned, checked in, and checked out. It may have a book drop where items can be returned.

Circulation Statistics: A count that shows how often an item was borrowed from the library over a certain period of time. See this [resource guide](#) from the American Library Association for examples of types of statistics gathered by public libraries.

Circulation System: The computer system libraries use to keep track of items borrowed by patrons at the library, linking information together so that library staff can see what is currently checked out by a patron, place items on hold, and send reminders when items are due or overdue. Also referred to as an ILS or Integrated Library System.

Civic and Social Literacy: Being able to talk with others in a respectful way, even when there are differing opinions. It also means understanding how to take part in your community work with others, and help make positive changes in society. See the PA Forward [website](#) from the Pennsylvania Library Association for more information on this type of literacy.

Code: Also known as the Public Library Code ([24 Pa. C.S. §§ 9301-9376](#)).

The Compendium: A [resource](#) created by the Office of Commonwealth Libraries and the main way that OCL staff share news, updates, and learning opportunities with libraries across Pennsylvania.

Collection: A group of library items, such as books, movies, or digital resources, that are organized so they can easily be found and used. Collections can be physical (on the library's shelves) or online. The University of South Florida provides a [comprehensive listing](#) of types of library collections.

Collection Agency: A company that helps collect unpaid bills for a library. If someone does not return or pay for lost or damaged library items for an extended period of time, some libraries work with these agencies to recover the costs.

Collection Development/Management/Maintenance: The [process](#) libraries use to decide what items to add, keep, or remove from the library's collection. It is based on community needs, how often items are used, funds available, and other factors.

Collection Management Policy: A policy that explains how a library chooses what to add or remove from its collection, including the process for selecting materials, handling donated items, and gifts of items. The policy also helps the library clearly respond to challenges to an item in the library's collection. A sample Collection Management Policy is available on the [Sample Policies and Procedures](#) section of the [Public Library Operations and Board Governance LibGuide](#).

Collection Management: How a library takes care of its collection, making sure that it meets the community's needs and stays in good condition. This includes looking at what the library already has in its collection, what is missing, and what the community may need in the future. See the [guides and resources](#) available from the American Library Association about collection management.

Community Engagement: The ongoing process of building relationships, listening to others, and working together to make lasting, positive changes in the community.

Confidentiality: A library keeps personal information and what library users read, borrow, or research private unless required by law. See the [American Library Association's Code of Ethics](#) for a full explanation and additional information.

Conflict of Interest: A conflict of interest happens when someone might benefit personally from a decision they help make in their role at the library, and makes it difficult for them to stay fair and objective. See this article from the [National Council of Nonprofits](#) for more information.

Consent Agenda: An agenda that groups routine items together that don't require a discussion, allowing the board to focus on major discussions and actions within the agenda.

Consolidated Administrative Unit: An entity that oversees the administration of a central library and its branches and/or bookmobiles. All libraries in this type of structure work together to provide consistent services.

Consortium: A group of libraries that agree to work together, usually to share resources and to reduce costs. Even though they are separate organizations, they find ways to work together to better serve their communities.

Consultant: An expert hired by a library to help solve a problem, provide advice, or needed when an outside opinion is helpful.

Continuing Education (CE): Learning opportunities in the form of training or instruction for library staff so they can stay up to date with providing library services. See the [guidance](#) from the Office of Commonwealth Libraries concerning the state standard requirements necessary for library directors and staff.

Copyright: A [legal right](#) that gives creators, such as authors, artists, and musicians, control over how their work is used. It means others cannot copy, sell, or share their work without permission, though there are some exceptions. See more information about copyright from the [American Library Association](#).

CORE: Leadership, Infrastructure, Futures: CORE is a division of the American Library Association that supports librarians and information professionals who work in key areas such as buildings and operations, leadership, technology, and managing collections. See more information from their [webpage](#).

Courier/Delivery Staff: Library staff trained to move books and other items between different library locations in the same system, consortium, or district. This can be a faster and more cost-effective option than using the post office or a commercial delivery service.

County Library: A local library or a division of a local library that receives funding from the commissioners of the county for the express purpose of making its resources and services available for free to everyone in their county and bringing direct library service to those in the county not served by other local libraries located within the same county.

County Coordination Aid (CCA): A form of [state aid](#) to be used for implementing a plan for countywide library services for county residents, and guarantees that all residents of the county receive free library service.

County Coordination Agreement: An annual agreement between all county libraries on how to spend County Coordination Aid (CCA).

D

Database: A collection of organized digital information about a specific topic or field. Databases are regularly updated and provided in a consistent format to help make information easily searchable and accessible. See this article from indeed.com that explains the [variety of databases](#) that exist.

Demographics: Information that describes the characteristics of a group of people, such as their age, education level, income, and ethnic background. This data can help libraries tailor services or plan efforts to communicate with their communities about what services are offered. The [U.S. Census](#) is a common source of demographic information.

Deselection: Also known as weeding, this is the process of removing items from a library's collection. Items are usually withdrawn because they are outdated, rarely used, or in poor condition.

Dewey Decimal Classification: A system used to organize items in a library by subject. It divides all knowledge into ten main categories, which are then broken down into smaller subcategories. Most public and school libraries in the U.S. use [this classification system](#), while academic and research libraries tend to use Library of Congress Classification.

Digital Divide: The gap between people who have access to computers, the internet, and digital technology and those that do not, often due to financial limitations. Public libraries play an important role in closing this gap by offering free internet access and technology services. See this [article](#) from the Urban Libraries Council for more insight into the digital divide.

Digital Preservation: The process of keeping digital materials usable over time. It involves making sure both the content and the tools needed to view it (such as software or file formats) continue to work in the future and includes converting physical items into digital formats to protect them from loss or deterioration. See this [article](#) from the Carnegie Reporter for more insight into digital preservation.

Disaster Recovery Plan: A plan that details how the library will respond to unexpected events, either in the library or community, ensuring it can resume operations quickly after a disruption. [IBM's](#) article on disaster recovery planning provides helpful considerations for this type of plan.

Disinformation: False information that is spread on purpose to mislead or deceive people, often to influence their opinions or actions. It differs from misinformation, which is incorrect information shared by mistake. To learn how public libraries help to combat both disinformation and misinformation, see this [article](#) from *Library Journal*.

District Advisory Council (DAC): Council of librarians and board trustees from district state-aided member libraries that review the district budget and help develop district plans, policies, services, and programs.

District Aid: A form of [state aid](#) received by District Library Centers to provide resources and services without charge to all the residents and taxpayers of its district.

District Consultant: A librarian in a district library center that is full-time, has an accredited MLS degree, has 5 years of library experience, and a minimum of 2 years

supervisory experience (or equivalent). [District consultants](#) support libraries within their district, and may assist with providing advising services and support on collection development, services to special groups, board governance, library services, learning opportunities, and cooperation between local libraries.

District Library Centers (DLC): Local libraries that help coordinate services of local libraries within their district library center system. They may contract with a municipality, board of trustees, or managers of a local library to become part of the system and may offer free library services to every community member in the district. These centers provide additional support to local libraries and may share or collaborate with other district library centers in providing library services. The primary purpose of State Aid to district library centers is to enable these libraries to exercise leadership in developing a coordinated system of library services among all the local libraries of the district to bring maximum diversity, quality, and use to all the residents of the district. Currently, 29 district library centers are in Pennsylvania, and all state-supported public libraries are members of a district. See this [LibGuide](#) from the Bureau of Library Development for more information on district library centers.

District Library Center Aid: The primary purpose of State Aid to district library centers is to enable these libraries to exercise leadership in developing a coordinated system of library services among all the local libraries of the district to bring maximum diversity, quality, and use to all the residents of the district. See this [LibGuide](#) from the Bureau of Library Development for more information on district library centers.

District Negotiated Agreement (DNA): A negotiated agreement between the DLC, district member libraries, and OCL that outlines how state aid will be used to provide district services.

Diverse Collection: A library collection that includes a wide variety of voices, perspectives, and opinions, especially on important or sensitive topics that meet the needs and interests of the community the library serves. See this [article](#) from the American Library Association for more information on a library's diverse collection.

Duty of Care: The expectation of a board trustee to stay informed about the library's finances, legal matters, and operations. Trustees are expected to actively participate in decision-making and to use their best judgement for the library. More information about this legal duty is available from [BoardSource](#).

Duty of Loyalty: The expectation of a board trustee to act in the best interest of the library, not for one's own personal gain or advantage. More information about this legal duty is available from [BoardSource](#).

Duty of Obedience: The expectation of a board trustee to ensure the library is using its resources while adhering to the library's mission and is following all local, state, and federal laws and regulations. More information about this legal duty is available from

[BoardSource](#).

E

Electronic Book (E-book): A book in digital format readable on a computer, tablet, cell phone, or E-reader. Many libraries allow the borrowing of E-books through their online catalogs or other platforms. The American Library Association provides a [listing of E-book platforms](#) available for libraries.

Endowment: Money that is invested long-term (such as stocks, bonds, or savings accounts) to earn income over time. The original amount (principal) is not spent, and the earnings from the investment are used to support the library. See more information about endowments from [Fundraising for Libraries](#).

End User: The person using the library's resources or services to find the information they need. It is who the library is helping, whether they are searching for an item, doing research, or using a database. See this [article](#) from American Libraries to learn more about library users and user experience.

Equal Distribution Grant: State aid funds that provide an equal share of funds per qualifying district library centers, local libraries, and library systems. See the Bureau of Library Development's [State Aid LibGuide](#) for more information on a library's eligibility and how this grant is calculated.

Equality in Library Services: Ensuring everyone has fair and equal access to library resources, no matter their background, income, or access to technology. For libraries, this means providing services and information to all people and working to remove barriers, such as cost or lack of access to the Internet, that might prevent someone from using the library. See the American Library Association's [resources and guidance](#) on equality in library services.

Equalization Aid: State aid funds that provide special funding for libraries in economically distressed areas of the state. See the Bureau of Library Development's [State Aid LibGuide](#) for more information on a library's eligibility and how this aid is calculated.

Equity in Library Services: Making sure everyone has what they need to fully use and benefit from the library, even if that means providing extra support to those who face disadvantages. For libraries, this means recognizing that not everyone starts from the same place, taking steps to help underserved or marginalized groups access resources and opportunities, and promoting diversity and inclusion. See the American Library Association's [resources and guidance](#) on equity in library services.

E-Rate (Education Rate): The [FCC's E-Rate program](#) makes telecommunications and information services more affordable for schools and libraries. With funding from the

[Universal Service Fund](#), E-Rate provides discounts for telecommunications, Internet access, and internal connections to eligible schools and libraries.

Executive Session: Part of a board meeting or separately scheduled meeting that is not open to the public. They are typically used for sensitive or confidential topics, such as evaluating the library director, handling staff grievances, discussing staff pay, or business negotiations. These sessions allow the board members to have open and private discussions related to the library.

Exempt Employee: Employees in this classification are not subject to certain state and federal wage and hour laws. They do not receive overtime pay and typically have higher-level roles such as the library director, administrative roles, and department manager roles. They earn a salary instead of an hourly wage. See the [Fair Labor Standards Act](#) for more information.

F

Facilities Plan: This type of plan focuses on the library's physical space, outlining current and future needs, as well as how a building is managed and maintained. It helps ensure the library's facility supports its operations. [Spacewell](#), a company that focuses on building performance, provides a nice overview of the possible components to consider in designing a facilities plan, and why it's important for an organization.

Federated Administrative Unit: A federated administrative unit oversees the management of the library federation. A federated administrative unit can be one of the federated member libraries, can be a stand-alone entity, and can even share this role as a co-administrative unit with another library in the library federation. This unit's system board provides direction to the member libraries and creates some policies that apply to all of them. This board can also be delegated to approve the funding formula for the library federation and its distribution to the federated member libraries.

Federated Member Libraries: Local public library outlets in a library federation. Each has a board of trustees and creates policies while also following policies developed by the system board. They must offer free access to everyone in their entire system service area.

Federated System Administrator: Librarian that oversees the management of the library federation, works with and supports the library directors of the federated member libraries, and is supported by a system board.

Fiction: Stories made up by the author, rather than based on real events. Fiction is written to entertain, inspire, or help readers imagine different experiences, people, or places.

Financial Literacy: Knowing how to manage money more wisely. This includes understanding how to budget, spend, and save money responsibly, as well as making

smart financial decisions for both personal life and business needs. See the Pennsylvania Library Association's [PA Forward website](#) for more information about this type of literacy.

Financial Review: An examination of the library's financial statements by an independent auditor to ensure that standard accounting rules (GAAP) are followed. A financial review is less detailed and thorough compared to a full audit of a library's financial statements. The Office of Commonwealth Libraries requires public libraries to have [audits or financial reviews](#) completed to qualify for receiving State Aid.

Fiscal Oversight: The board of trustees is responsible for ensuring the library is financially stable and well-managed. This includes creating financial policies, making smart decisions when setting the budget, reviewing financial reports and asking questions, and following best financial practices. See this [article](#) from the Charity CFO on the importance of fiscal oversight.

Fiscal Year: A 12-month period that a library uses to track and manage its finances. It doesn't have to start in January or follow the regular calendar year.

Focus Group: A small group of people brought together to talk about a specific topic or issue. Their ideas and opinions can help the library understand important issues facing their community and to learn what library users need and want, which helps with planning services and programs.

Freedom of Information: The legal right for the public to access government records and information. This right is protected by a law called the [Freedom of Information Act \(FOIA\)](#).

Freedom to Read Foundation (FTRF): A [nonprofit organization](#) founded by the American Library Association to support everyone's right to read, listen to, and access different ideas without government control. It also defends the right of libraries to offer a wide range of information to the public.

Frequently Challenged Book: A book in a school or public library that people repeatedly ask to be removed because they believe the content is not suitable, usually for children or teens. The American Library Association keeps a list of the [top 100 most frequently challenged books](#) by decade.

Friends of the Library: A group of volunteers who support the library by helping raise funds and promote its services to the community. See the [United for Libraries](#) website, which is the Association of Library Trustees, Advocates, Friends and Foundations, for more information.

Full-Time Employee: A full-time employee works at least 35 hours per week and is considered full-time according to the library's personnel policy manual.

Fund-Raising: Activities a library does to ask for donations from individuals or groups. The money raised can help support capital improvement projects or operating expenses.

G

GAC Guidelines: The guidelines developed by the [Governor's Advisory Council on Library Development \(GAC\)](#) to provide libraries with procedures for implementing laws, regulations, and official statements of policy. See the GAC's website for the [guidelines](#) currently available.

Gate Count: The number of people who enter or leave a library, measured by a device at the door. Each time someone enters or exits the library the counter is activated. Gate counters help to show how often the library is being used over a period of time (by hour, day, month, and year).

Genealogy: The study of a person's family history and ancestors. Libraries may have special collections and online resources to help people research their family trees and learn about local history. See the [resources and guides](#) from the American Library Association for more information.

Genre: A category or style of books, music, movies, or art. In literature, genres help group items by how they are written (such as fiction or poetry), their themes (such as romance or mystery), and by subject (cookbooks, science, or history).

Gift Book Program: A special library program where people can donate money to purchase items for the library's collection in memory of someone who has passed away or to celebrate a special occasion. The library usually chooses the items for the collection, and may include a bookplate in the item to honor the person and thank the donor.

Gift Collection: A large donation of books or other materials given to a library, usually focused on a certain topic, person, type of content, or format. These items are often gathered by someone over time based on their personal interests. For more information, see this [resource](#) from the American Library Association.

Governance: Governance is the framework approved by the board of trustees to guide and oversee the library director and the library's operations. It involves creating and approving policies, planning for the future, ensuring the facility is safe and accessible for the community, and approving the budget for the library.

Governing Board: A group of volunteers legally responsible for overseeing the library's operations, finances, and compliance with local, state, and federal laws. The governing board ensures the library's long-term success through planning, supervising and evaluating the library director, recruiting and orienting new trustees, advocating in the community, and raising funds for the library.

Governmental Entity: A government organization that carries out specific duties or services for the public. Examples of these government entities include state governments,

county governments, boroughs, townships, and cities or towns (also called municipalities).

Governor’s Advisory Council on Library Development (GAC): The [Governors' Advisory Council \(GAC\) on Library Development](#) is established by the Public Library Code ([24 PA.C.S. Education § 9312](#)). It has twelve members appointed by the Governor. The GAC’s responsibilities include advising and making recommendations to the Governor, the Secretary of Education, and the Deputy Secretary of Education, who is also the Commissioner for Libraries and State Librarian. They provide advice and recommendations on the State Library of Pennsylvania’s policies and operations and Pennsylvania’s system of State aid to libraries.

Grant: Funds given by a private group, organization, or government entity to help support a project or cause. To receive a grant, a library usually has to apply and explain why the project is important and how the funds will be used.

Graphic Novels: Book-length stories told through comic-style artwork and text. Unlike regular comic books, graphic novels usually have more complete, detailed plots. Many public libraries offer graphic novels based on what their community is interested in. See this [article](#) from *School Library Journal* on the popularity of graphic novels.

H

Health Literacy: The ability to understand and use information to make good decisions about one’s physical, mental, emotional, or spiritual health. Health literacy also means being able to understand health information when caring for someone else. See the Pennsylvania Library Association’s [PA Forward website](#) for more information on this type of literacy.

Hold: When a book or other item is checked out, many libraries allow someone to place a ‘hold’ on it, which means as soon as the item’s returned, it can be borrowed. This can be accomplished by calling the library and speaking directly to a staff member or using the online catalog to place a hold. For more details on how this process generally works, see this [blog post](#) from the New York Public Library they provide to their users.

Hosting Solutions and Library Consulting (HSLC): A [support organization](#) and resource for academic, public, school, and specialized libraries that help these libraries succeed by providing technical support and expert advice.

I

Incentive for Excellence Aid: A form of state aid for libraries or library systems that meet certain eligibility criteria. To learn more about how libraries qualify for this aid and how it is

calculated, see the Bureau of Library Development's [LibGuide](#) on State Aid.

Independent Library: A public library outlet that is not a member of a library federation. It has a board of trustees and is responsible for providing free access to everyone in its service area.

Information Desk: A help desk near the entrance of a library where staff members answer basic questions, explain library services, and guide people to the right place in the library if they need further assistance.

Information Literacy: The ability to know when you need information, find it, understand it, and use it effectively. Information literacy includes knowing how to tell if a source is trustworthy or not, and using information to learn, solve problems, or complete a project. See the Pennsylvania Library Association's [PA Forward website](#) for more information on this type of literacy.

In Process: The library has received a new item, but it's not ready for checkout because it's still being prepared for adding to the library's collection.

In-Service Training: Training provided by the library to help its employees learn new skills or improve their current ones. See the Bureau of Library Development's [Professional Development](#) LibGuide for further information.

Institute of Museum and Library Services (IMLS): The [Institute of Museum and Library Services \(IMLS\)](#) is an independent federal agency and provides federal [Library Services and Technology Act \(LSTA\)](#) funding to states through its [Grants to States program](#). In Pennsylvania, the Pennsylvania Department of Education's (PDE) Office of Commonwealth Libraries (OCL) administers these funds to support the goals outlined in the OCL's IMLS-approved [5-year plan](#).

Integrated Library System (ILS): A [software system](#) helping libraries manage materials, orders, patrons, and payments. It usually includes interfaces for both library staff and patrons to use. Also referred to as a circulation system.

Intellectual Freedom: The right of every person, protected by the First Amendment, to read, learn, and share ideas, even if those ideas are unpopular or upsetting to some. This right has some limitations, but is an important part of free speech. See the [resources](#) from the American Library Association for more information.

Interlibrary Delivery Service (IDS): A [delivery and shipping system](#) that helps participating libraries share resources with each other, providing a more cost-effective and easier way for people to borrow books and materials from libraries throughout Pennsylvania.

Interlibrary Loan (ILL): If a library does not have a book or item needed by a patron, they can request to borrow it from another library. Interlibrary loans allow libraries to share their collections to better serve library patrons. See the [Pennsylvania Interlibrary Loan Guidelines](#)

for more information.

Intra-library Loan: When one library in a library system or district lends an item to another library in the same system or district. This is usually quicker than borrowing from outside the system or district, especially if there's a delivery system in place between the libraries.

Intranet: A private website that only library staff can use and access. Usually, it contains important information and resources that employees need to do their jobs while working at the library.

K

Keystone Recreation, Park and Conservation Fund Grants for Public Library Facilities:

The [Keystone Recreation, Park and Conservation Fund](#) was established by an act of the General Assembly in 1993. The Office of Commonwealth Libraries (OCL) administers the public library portion of this program funded from a portion of real estate transfer taxes. Grants pay up to 50 percent of eligible costs to plan, acquire, construct, or rehabilitate public library facilities. See the Bureau of Library Development's [LibGuide on Keystone Grants](#) for more information.

L

LAMP: [The Library of Accessible Media for Pennsylvanians \(LAMP\)](#) is a free braille and accessible media service for people with temporary or permanent low vision, blindness, or a physical disability that prevents reading or holding a book. Support for this service is offered at library branches in Philadelphia and Pittsburgh to residents throughout the Commonwealth.

Large Print (LP): Books that use a larger text size than usual to make reading easier, especially for those who have vision problems, older adults, or young readers. See more details from the [National Library Service for the Blind and Print Disabled](#) (Library of Congress) on large print materials.

Learning Management System (LMS): An online platform that helps library staff and trustees learn more about their roles at the library. It can include course materials, assignments, quizzes, and discussion spaces. In Pennsylvania, the Office of Commonwealth Libraries offers access to the [PA Library Staff Academy](#), a special LMS for library staff and trustees.

Librarian: A [trained professional](#) who manages a library (or department within a library) and helps people find the information and materials they need. Librarians choose, process, and organize library items, and also provide help with research, learning, and borrowing services. In the U.S., someone is called a librarian if they have a master's

degree in library or information science (MLS, MLIS, MIS, etc.) or are certified by a state agency.

Librarianship: The profession focused on managing and sharing information in all formats, such as books, digital media, and more. It includes the tasks of choosing, organizing, preserving, and helping people find and use information. See the American Library Association's [resources](#) about careers in public librarianship.

Library Advocate: Someone who values libraries and speaks up to support them, especially when their funding or the freedom to read is at risk. See this [article](#) from the American Library Association on advocacy.

Library Bill of Rights: A formal statement from the American Library Association that states all libraries should offer materials that represent different opinions and ideas, and that no one should censor or limit what people can access. See the American Library Association's website for the [full statement](#).

Library Card: A paper or plastic card given to someone who signs up to use the library. A library card can be used to borrow books and other items. See more information on [library cards](#) from the American Library Association.

Library Collection: All the books and other materials a library has in its collection, organized so people can easily find and use them and often include smaller groups of items.

Library Community Profile: Information about a library's community, including local population, race, age, income and more to be used as a snapshot of a library's service area.

Library Conference: A planned event where librarians, library directors, library staff, and others who work with and for libraries come together to meet, share ideas, and learn about new trends, tools, and updates in the library world.

Library Director: The person in charge of the day-to-day operations of a library or library system. They oversee planning, budgeting, implementing policies created by the board of trustees, managing staff, and evaluating programs. In public libraries, the library director is usually supervised by a board of trustees. See this [article](#) from the American Library Association on the role of library directors.

Library Federation/Library System: At least two local libraries in a county or several counties working together. To be part of the federation, member libraries must voluntarily agree to be included, serve at least 25,000 people, and delegate to a system of board of directors the control to create policies. By working together, these libraries can offer better support and services to their communities.

Library of Things: A library collection of useful items that a person can borrow and use, rather than a person buying the item to only be used for a limited period of time. This type

of library service promotes access to items people need without the additional expenses involved. See the [resources](#) available from WebJunction about how libraries lend items beyond books.

Library Operating as a 501(c)(3) Organization: A library in Pennsylvania that operates as a nonprofit organization has applied for and received nonprofit status from the Bureau of Corporations and Charitable Organizations. This is done by filing specific paperwork, including Articles of Incorporation – Nonprofit, and a docketing statement. Being recognized as a nonprofit in Pennsylvania may make a library eligible for certain benefits, like exemptions from state sales, property, and income taxes. Nonprofit libraries in Pennsylvania are generally established for charitable purposes. These libraries follow both the [Nonprofit Corporation Law in Pennsylvania \(Title 15 – Subpart C\)](#), [state laws and regulations](#) for charities, and Pennsylvania Library Laws.

Library Operating as an Authority of Government: An organization that provides library services to the public (considered a public works project) without receiving a dedicated governmental tax. They are not a department of government or a County Library. Under the [Municipality Authorities Act](#) (June 19, 2001, codified at 53 Pa. C.S. § 5601 - § 5622), the public works projects must be in the proprietary fields of government, must have a public interest, and must be self-sustaining. These libraries accomplish their mission without direct financial support of counties, municipalities, and school districts and are considered separate legal entities.

Library Operating as a Department of Government: A library operating as a department of government (like a borough, township, or municipality) is a local library, and its management can be impacted by this government connection. Library staff are employees of the governmental unit, and the library is governed by government officials. The library may have a board delegated with decision-making responsibilities for their library by the governmental unit.

Library Referendum: An election that is voted upon by local residents on a specific issue related to their library, such as funding, building projects, or changes in services. Only registered voters in the area affected can take part in the decision. This [article](#) from *American Libraries* magazine shows how states performed in the 2023 year on library measures and referendums.

Library School: A college or university program that offers advanced degrees in a Master of Library Science (MLS), Master of Library and Information Science (MLIS), Master of Information Science (MIS), etc. These programs train students for professional jobs in libraries and other information-related fields. Today, many of these schools use the term ‘information studies’ to reflect a broader focus beyond just libraries. See this [directory](#) of ALA-Accredited Programs.

Library Science: The study and practice of how to find, organize, manage, and share information to help people. It’s usually taught in graduate programs that offer a master’s

degree in this area of study and prepares people for professional jobs in libraries and other information settings.

Library Services and Technology Act (LSTA): A [federal act](#) that provides federal funds through state library agencies to help all types of libraries. The funds are used to improve access to learning and information, support statewide library programs, and offer grants for special projects and partnerships.

Library Trustee: A person appointed or elected to be part of a board of trustees responsible for governing a library or library system. Trustees govern through long-range planning and budgeting, setting policies, advocating, and raising funds for a library.

Lifelong Learning: The idea that people should be able to keep learning new things at any age, even outside of school. Libraries support this by helping people build the skills to find and use information, and by offering resources on many topics for all reading levels.

Line-Item Budget: A type of budget where a library lists its expected expenses in separate categories or lines, such as books, salaries, or supplies. This helps the library plan how to spend its money and keep track of its income and expenses.

Listserv: A tool that helps manage email lists by automatically sending messages to everyone who subscribes. It also updates the list as people join or leave. The Office of Commonwealth Libraries manages a [number of listservs](#) that send out important information to those who subscribe.

Literacy: The ability to read and write. Functional literacy means having enough reading and writing skills to handle daily tasks as an adult, like reading instructions or filling out forms. Public libraries play an important role in helping people build these skills through literacy programs. To learn more, see this [article](#) from the Pennsylvania Library Association on how libraries support literacy in their communities.

Little Free Libraries: A nonprofit organization that runs a network of book exchanges, often small wooden boxes placed around the community where people can take a book or leave one to share. Little Free Libraries can be found across the Commonwealth, and there are more than 150,000 registered Little Free Library book-sharing boxes in 120 countries around the world. To find one near you, check out this [interactive map](#).

Local Library: The [Public Library Code](#) defines a local library as any free, public, nonsectarian library, whether established and maintained by a municipality or by a private association, corporation or group which serves the informational, educational and recreational needs of all residents of the area for which its governing body is responsible, by providing free access to an organized and currently useful collection of printed items and other materials, including free lending and reference services and the services of a staff trained to recognize and provide for these needs.

Loan Period: The length of time an item can be borrowed from a library. Many libraries allow an item to be renewed for more time if no one else has placed it on hold.

Local Financial Effort (LFE): Funds from local sources, and is reviewed when determining eligibility for state aid. The [22 PA Code § 131.51 to § 131.64](#) lists all authorized components of local financial effort.

Local Government Funding: This funding may include support directly from the library's county, school districts, or municipalities. Depending on the library's structure, funding may be received through a federated administrative unit, a tax millage, per-capita allocations, or other earmarked funds from government sources.

Local Library Grant: Funds administered by the Office of Commonwealth Libraries for projects made possible by the Library Services and Technology Act (LSTA) funds from the U.S. Institute of Museum and Library Services. An [information tutorial](#) on the fiscal year 2024-2025 local library grants can be found on the PA Library Staff Academy.

LSTA Grant Funding: The [Library Services and Technology Act](#) is a federal program for libraries focused on technology services and access to library resources. State library agencies across the United States use LSTA grants to support subgrants to libraries.

M

Machine-Readable Cataloging (MARC): An international standard digital format used to store and share information about books and other materials in libraries. It was developed by the Library of Congress to make it easier for libraries around the world to create and exchange catalog records with each other. See more information on [MARC records](#) from the Library of Congress.

Marketing: The process of understanding and meeting community needs by promoting library services through research, advertising, and outreach. It helps to align library offerings with public interest and involves tools such as newsletters, flyers, and email campaigns. Marketing activities are typically led by the library director with possible support from the board of trustees.

Media and Communications Plan: A strategic, year-long approach to promoting the library, enhancing its public image, and building community connections. It helps to increase awareness, attract support, clarify the library's role, and engage both current and underserved audiences through digital, written, and spoken communication. See the American Library Association's [toolkit](#) on a media and communications plan.

Matching Grant: A grant where a donor (such as a foundation, government agency, or individual) agrees to give money only if the recipient raises an equal amount. Most matching grants are dollar-for-dollar and must be matched within a set timeframe. An

example of a matching grant for Pennsylvania public libraries is the [Keystone Grants for Public Library Facilities](#).

Materials Budget: The part of a library's budget set aside to purchase books, media, magazines, and other resources for the public and staff. It does not include spending on salaries, equipment, or services. See these resources from the American Library Association on [budgeting and finance](#).

Media Literacy: The ability to find, understand, evaluate, and create messages in different formats, such as television, social media, and news. It involves thinking critically about how media is made, the techniques used, and how it affects individuals and society. See the [resources](#) available from the American Library Association for more information on media literacy.

Media Relations: Involves creating and maintaining a positive relationship between the library and various media outlets, such as journalists, bloggers, and other community influencers. This can include working with the media to share the library's message in a credible way and generating publicity that highlights its value to the community.

Meeting Room: A space in the library that people can reserve for group meetings or events, and where libraries hold their own programming and meetings. These rooms often include chairs, tables, a podium, presentation equipment, and sometimes a small kitchen area. Libraries usually have policies or guidelines that explain how the room can be reserved and used.

Memoir: A personal story written by someone about their own experiences and memories, often focusing on meaningful events they witnessed or were part of.

Minutes: Minutes are the written records of what happens during a meeting. Clear minutes in board meetings help show the board is following its duty of care responsibility and that the board has done its job properly. Well-written minutes provide proof the meeting was officially called, that proper parliamentary rules were followed, and the agenda was completed.

Motion: A formal proposal made during a board meeting to be discussed, debated, and voted upon by board trustees.

N

National Library Legislative Day: An annual event in May where librarians, library supporters, and trustees go to Washington, DC, to meet with lawmakers and advocate for important library issues.

National Library of Medicine (NLM): The largest [medical library](#) in the United States, run by the National Institutes of Health (NIH). It holds over 7 million items, including one of the

world's best collections of rare and historic medical works.

National Library Service for the Blind and Print Disabled (NLS): A [national library program](#) run by the Library of Congress that provides Braille and audio books to people who are unable to read standard print. These materials are shared through a network of local and regional libraries. In Pennsylvania, this service is called [LAMP](#) (Library of Accessible Media for Pennsylvanians).

National Library Week (NLW): A yearly celebration in the spring that highlights the important role libraries and library staff play in communities. Libraries across the United States take part in this celebration with displays, events, and promotions. See this [resource](#) from the American Library Association detailing how libraries and communities can participate.

National Library Workers Day (NLWD): A day during National Library Week dedicated to celebrating and recognizing the valuable work of all library staff. See more information from the [American Library Association](#).

Noncirculating: Library materials that cannot be checked out and must be used inside the library, unless special permission is provided to borrow the item for a limited period of time. These items often include reference books, indexes, and some magazines or journals.

Nonfiction: Writing based on real events, people, or facts. Includes history, biographies, science, and how-to books. In public libraries, nonfiction is usually organized by call numbers using the Dewey Decimal Classification System.

Nonresident User: Someone who uses a public library but does not live in the area the library serves. Some libraries offer nonresident library cards for a small fee and valid ID.

Nonsectarian: Not connected to any specific religion or religious group.

Non-Exempt Employee: Employees in this classification are entitled to overtime pay and are paid an hourly wage under specific state and federal wage laws. See the [Fair Labor Standards Act](#) for more information.

Non-State-Aided Library: A type of library that does not receive State Aid funding and is not required to meet any of the standards in the Public Library Code. They may not have a specific area they serve, and they can be managed by either paid staff or volunteers. If the library is part of a library federation or library system, the system might set its own rules or guidelines for how this library operates.

O

Office of Commonwealth Libraries (OCL): The Office of Commonwealth Libraries (OCL) is part of the Pennsylvania Department of Education. Its role is to provide excellent and equitable library services and lead libraries in offering library services across Pennsylvania. The OCL supports libraries in helping people of all ages in their journeys to grow, achieve their goals, and live successful lives. It includes two main divisions: the [Bureau of State Library](#) and the [Bureau of Library Development](#). The OCL is led by the [Deputy Secretary of Education, who is also the Commissioner for Libraries and State Librarian](#), a position appointed by the Secretary of Education.

Onboarding: A process for new library directors and board trustees to help them learn about the library as an organization and provides them with knowledge, insight, and resources about their role.

Online Catalog: A digital tool that allows someone to search a library's collection of books and other materials by author, title, subject, or keywords. An online catalog is usually available on library computers or online, and most public libraries offer free access to it.

Online Computer Library Center (OCLC): A global organization that helps libraries share resources and information. It offers services like cataloging, managing books and materials, interlibrary loans, and access to databases. [OCLC](#) also runs [WorldCat](#), the world's largest online library catalog, with information on millions of items from libraries worldwide.

On Order: A term used when a library has requested an item but has not yet received it from the supplier.

Online Public Access Catalog (OPAC): A searchable online database that shows what books and other materials a library owns. An OPAC is usually available on computers in the library, often near the reference desk where staff can help. Users can search by author, title, subject, or keywords and can print, download, or email the results.

Open Access: Free, online information that anyone can read and use without having to pay for access to the information. This model was created to help researchers and libraries avoid high subscription costs and make knowledge more widely available.

Operating Budget: The yearly amount of money set aside to cover a library's day-to-day expenses, such as staff salaries, books, supplies, equipment, and services.

Outcomes: The positive results or changes that happen to people after taking part in a library program, such as learning something new, gaining a skill, changing behavior, or improving their life in some way. See more [information](#) about outcomes from the Institute of Museum and Library Services.

Outcomes-Based Evaluation (OBE): A method of measuring how well a library's programs and services help people improve, such as gaining new skills, changing behavior, or

enhancing their lives. See this resource from the Public Library Association regarding [outcomes-based evaluation](#).

Outlet: A local library, branch, or bookmobile.

Output Measure: A way to count how much work a library or program does over a certain period of time, such as the number of books checked out or programs held, or people attended. It helps evaluate and compare performance.

Outreach: Library services and programs that reach people who do not usually use the library or have limited access to it. Larger libraries often have a dedicated outreach librarian or team of staff to help connect with underserved groups in the library's community. See this resource list from the American Library Association on [community engagement and outreach](#).

Overdue: A library item that has been borrowed and not returned by its due date. Libraries often send reminders and may charge a fine for late returns of items.

P

Page: A library staff member who retrieves materials from storage and takes care of routine tasks such as reshelving books, organizing shelves, and finding requested items.

PA Library Staff Academy: The [PA Library Staff Academy](#) is an online learning platform made for people who work or volunteer in Pennsylvania libraries. It's hosted on Niche Academy, and offers training and resources to help library staff, library directors, board trustees, and volunteers grow their skills.

PA Public Library Data Survey: A yearly summary that shares what the library did over the past year and its financial status. In Pennsylvania, this also refers to the [Annual Report](#), which all public libraries that receive State Aid must complete and submit.

Paraprofessional: A library support staff member who is trained to follow specific procedures but does not tend to make professional decisions or judgments on their own.

Parliamentary Procedure: Used to keep board meetings organized and help trustees make decisions efficiently. With parliamentary procedure, one issue is discussed at a time, each trustee involved speaks one at a time, the group checks to ensure there are enough members present to make a decision, a trustee makes a motion to propose an action, and the entire group votes on the proposal. Many boards use [Robert's Rules of Order](#) as a parliamentary procedure guide for running meetings because it provides a clear format.

Partner/Partnership: A collaboration and relationship between a library and another type of organization, usually focused on a specific project. These partnerships can lead to long-term collaborations and future opportunities. See this [compilation](#) of posts from *Public*

Libraries Online that describe various partnerships with public libraries and organizations.

Part-Time Employee: A part-time employee is one that works less than the number of base number of hours to be considered full time at the library and is considered part-time according to the library's personnel policy manual.

Patron: Anyone who uses a library's resources and services, whether or not they have a library card. Other terms used include user, customer, member, etc.

Patron Data: Personal information about a library user, such as their name, address, phone number, borrowed items, and any fines or fees. For privacy reasons, libraries usually do not keep long-term records of borrowed materials or use personal information for marketing. See the Public Library Association's [resource listing](#) on patron privacy.

Pennsylvania Association for Nonprofit Organizations (PANO): [PANO \(the Pennsylvania Association of Nonprofit Organizations\)](#) is a statewide membership organization that helps support the many nonprofit organizations that serve people across Pennsylvania. By joining PANO, members become part of a statewide and national network that speaks up for and supports the nonprofit community, including libraries.

Pennsylvania Citizens for Better Libraries (PCBL): [Pennsylvania Citizens for Better Libraries \(PCBL\)](#) is a membership organization for anyone to join if they care about having strong, well-funded libraries across the state. This includes library users, staff, board trustees, government leaders, and friends of the library. The goal is to ensure all Pennsylvanians have access to libraries that are well-funded and provide the best possible library services.

Pennsylvania Department of Education (PDE): The [PDE](#) oversees school districts and schools across the Commonwealth as well as policies related to public, academic, and school libraries, and the State Library of Pennsylvania. The State Librarian is one of the Deputy Secretaries of PDE.

Pennsylvania Library Association (PaLA): The [Pennsylvania Library Association \(PaLA\)](#) is a statewide membership organization that supports libraries and the people who work in them and support them. This includes library staff, board trustees, and friends of the library groups. PaLA helps libraries grow by offering ways to connect, share ideas, and learn from each other. It also encourages leadership, teamwork, and new ideas in the library community.

Performance Evaluation: The process of assessing how well an employee has done their job duties in the library.

Periodical: A publication, such as a magazine, that is released regularly and includes various articles, stories, or reviews written by different people.

Personnel Policy Manual/Employee Handbook: A manual given to library employees

when they are hired, explaining their rights, responsibilities, rules, and expectations at work.

Pick-Up Location: The library or place where a requested item is held until the borrower is notified and picked up. Some online catalogs allow borrowers to choose their pick-up location when they make the request for an item.

Picture Book: A book mostly made of pictures, with little or no text, meant for young children. These books can also appeal to adults because of their beautiful illustrations or unique stories.

Planned Giving: A type of donation where someone includes a gift to a library or organization in their will or long-term financial plans. It reflects the person's values and is often part of a library's fundraising efforts.

Policy: A plan or approach that guides decisions and actions. It helps library staff and you as a trustee know how the library operates, and helps the community understand how to use the library. Policies should be approved by the library's board of trustees and should reflect the library's mission. See the Bureau of Library Development's LibGuide on [sample policies and procedures](#) available for public libraries.

POWER Library: Pennsylvania's Electronic Library, providing resources for both the PA community and community of library staff across PA; [POWER Library](#) is provided by the Office of Commonwealth Libraries, hosted by HSLC, and is made possible in part by Library Services and Technology Act (LSTA) funding from the IMLS (Institute of Museum and Library Services).

Press Release: An official statement from a library that shares news or information with the media. Press releases are meant to be published in newspapers, broadcasts, or online, and usually reflects the library's viewpoint on a current event or issue.

Preventive Maintenance: Regularly checking and fixing equipment to catch small issues early and avoid larger or more expensive problems later. Midhudson Public Library provides an example of a [maintenance checklist](#) for public libraries.

Print Management Software: A computer program that controls printing from library computers.

Privacy: A person's right to keep personal and professional information private and to avoid being watched or tracked, unless the law requires it. Libraries support this right and protect user information. See the [American Library Association's](#) resources on the right to privacy.

Procedure: A set of specific steps that are followed in a particular order. Procedures help in understanding how to carry out a policy and can be followed by library staff and the community when accomplishing a task. They don't need approved the library's board of

trustees and often provide clear, step-by-step instructions to ensure a policy is followed correctly. See the Bureau of Library Development's LibGuide on [sample policies and procedures](#) available for public libraries.

Processing: Getting items ready for the library shelves, and includes cataloging, reinforcing the item to keep it in usable condition, and adding spine labels, barcodes, and security tags.

Proclamation: An official public announcement made by a government or authority to share important information with the public.

Professional Development: Learning opportunities in the form of training or instruction for library staff so they can stay up to date with providing library services. See the [guidance](#) from the Office of Commonwealth Libraries concerning the state standard requirements necessary for library directors and staff on professional development.

Programming/Program: An activity or event sponsored or cosponsored by the library for the community. It can be a single event or a series, and can take place indoors, outdoors, or online. Programs can cover how to use the library, services provided by the library, library tours, or provide cultural, recreational, and educational information.

Profit & Loss Statement (P&L): A financial report that shows revenues and expenses over a specific time period. Also referred to as an income statement or statement of financial income.

Public Library: A library that is open to everyone in a community and offers free access to books, resources, and services.

Public Library Association (PLA): The [Public Library Association \(PLA\)](#) is the largest national association that supports public library workers. It's a division of the American Library Association (ALA) and focuses on helping library staff meet the changing needs of their communities. PLA works to make sure public libraries stay strong and valuable to the people they serve.

Public Library Subsidy: Also known as State Aid, these funds are paid to libraries that meet standards found in the [Statute \(24 PA. C.S. Education. Chapter 93\)](#) and the [Regulations \(22 PA Code § 131; § 141\)](#).

Public Relations (PR): Activities that help build a positive image of the library and raise awareness about its services, programs, and value to the community, with the goal to increase support and interest in the community. See this listing of [resources](#) from the American Library Association on public relations and marketing.

Public Services: Library activities where staff interact directly with library users, such as checking out items, answering questions, helping with resources, teaching users how to use the library, managing items in the collection, and requesting materials from other

libraries.

Publicity: Spreading messages through official channels like social media, press releases, or news conferences. The aim is to raise awareness about the library, create a positive image, and build credibility. Positive publicity, a part of public relations and media relations, can help increase the use of library resources and services.

Q

Quality of Service: How well a library meets the needs of its users and follows professional standards. It can be measured through data, statistics, and feedback. Factors such as the library's budget, management decisions, policies, library design, and staff morale can impact the quality of service.

Quorum: The minimum number of board trustees needing to be present at a meeting to make decisions and conduct legal business. If there is no quorum, the board president should end the meeting and reschedule it.

R

Readers' Advisory (RA): A service offered by a library staff member who helps library users find books based on their reading preferences. They recommend specific titles or authors and may create lists of suggested books. See the [resources](#) provided by the American Library Association on readers' advisory.

Ready Reference: A quick question that a library staff member can answer in a few minutes, usually by providing a single fact from one resource. Ready references are also books or materials that are frequently used to answer these questions, and can be kept near a library's service desk for easy access.

Reference Collection: A group of books with trusted information, like dictionaries and encyclopedias, that are not meant to be read from start to finish. These books are usually kept in a special section of the library and are often noncirculating without special permission because they are used in the library to answer questions.

Reference Desk: A help desk in the library where users can ask questions about finding information or using library resources, usually located near the reference collection. Many libraries are [combining the reference desk](#) with other service desks to make it easier for users to get help in one place.

Reference Interview: A conversation between a library staff member and library user to determine exactly what information the person needs. Sometimes, the real question is different from what was first asked. A reference interview can happen in person, over the

phone, or through email or chat.

Reference Librarian: A librarian who helps people find information by answering questions at the reference desk, over the phone, by email, or through chat. They also teach library users how to use the library's resources and technology and can assist in choosing reference materials to add to a library's collection. See the [resources](#) available from the American Library Association about reference librarians.

Reference Question: When someone asks the library for help finding specific information or learning how to use the library's resources. This can be done in person, by phone, or online, and is usually answered by a trained librarian or support staff, depending on the library.

Reference Services: Help provided by a trained librarian or library staff to meet users' information needs. This includes answering questions, teaching library users how to find and evaluate information, guiding users to resources, doing searches, tracking usage, and helping to build the reference collection.

Regulations: Written by administrative agencies, such as the Office of Commonwealth Libraries (OCL), to fill in the details of how to apply the statutes and increase flexibility and efficiency in the operation of laws.

Renewal: Extending the time someone can keep a borrowed item from the library, usually for the same length as the original loan period.

Request for Proposal (RFP): A document a library creates to ask vendors to submit bids for a project or service. It includes details about what the library needs so vendors can suggest how they would meet those needs and at what cost. See this [guide](#) from the American Library Association on RFP writing.

Resolution: An official decision or statement made by a library's board of trustees. Resolutions can be used for important actions such as approving budgets, choosing officers, or changing policies.

Return on Investment (ROI): A way to measure how much value a library provides to its community compared to the money spent on it. For example, a measure could be how much time or money people would need to get the same information if the library did not exist. Maine State Library has developed an [ROI calculator](#) for library use.

Right to Know Law (RTKL): Pennsylvania law ensuring the public can access government records and information. It explains how to request public records by filing a [Right to Know \(RTK\) request](#) form, what happens if a request is denied, how to appeal or take the matter to court if needed, and the role of the [Office of Open Records \(OOR\)](#) in handling disputes.

S

Selection: The process of choosing which books and other materials to add to the library's collection. Librarians, often experts in selection of materials, use reviews, recommendations, collection guidelines, and policy to make these decisions. Public libraries should have a [collection management policy](#) that outlines how they decide what items to include in their collections.

Selection Criteria: The guidelines librarians use to decide if an item should be added to the library's collection. These are based on the library's mission, the needs of its users, collection management policy, and the library's budget. Librarians also rely on reviews, recommended book lists, and other trusted tools to help make the best choices for the library. See the [resources](#) available from the American Library Association on selection criteria for libraries.

Self-Checkout: A system that lets library users check out books and other materials by themselves, without needing help from library staff. It works by scanning a barcode or RFID tag on each item, and is part of a growing trend toward self-service in libraries.

Serials: Publications issued on a regular basis, including newspapers, magazines, and journals.

Service Area/Service Community: The specific geographic region a public library serves.

Shelf Reading: The process of checking that books and other library materials are in correct order on the shelves, usually by call number/alphabetization. This task is often completed by library staff or volunteers to keep the shelves organized and items easy to find.

Shifting: The process of moving books or sections of a collection in a library to different spots on the shelves to create more space, especially in areas of shelving that have become too crowded.

Signage: All the signs in a library that help guide people to resources, services, and spaces, or give important information such as library hours, policies, or upcoming events or programs. Well-designed and clearly placed signage makes it easier for library users, especially those who are new to the library, to find what they need without seeking assistance from library staff. Niche Academy provides a [free webinar](#) that discusses best practices in library signage.

Space Planning: The process of determining how much space your library has or needs, and how to best use the space to support library goals and services to the community. WebJunction has many [resources](#) available on space planning for libraries.

Special or Rare Collections: Items that a library sets apart from the regular circulating collection because they are rare, valuable, or have local or historical importance. Usually, these materials cannot be checked out, and there may be limits on access to these items. The Pennsylvania State Library has [rare collections](#), with many digitally accessible online.

Stacks: Also known as the shelving areas of libraries.

Stakeholder: A person or group that cares about, is affected by, or benefits from the library. This can include people like library users, staff, local government, and community organizations. The American Library Association gives [examples](#) of both main (primary) and supporting (secondary) stakeholders for libraries.

Standards: In Pennsylvania, state-aided public libraries must follow certain [laws and regulations](#) to qualify for different types of state funding. Meeting standards depends on service community size, required educational background for the librarian in charge, and other service-related standards.

Statement of Financial Income: A financial report that shows revenue and expenses over a specific time period. Also known as a profit and loss (P&L) statement or an income statement.

State Aid: Also known as the Public Library Subsidy, these funds are paid to libraries that meet standards found in the [Statute \(24 PA. C.S. Education. Chapter 93\)](#) and the [Regulations \(22 PA Code § 131; § 141\)](#).

State Library: Also known as the Bureau of State Library, the [State Library of Pennsylvania's](#) main role is to gather, preserve, and share materials related to Pennsylvania. It serves the state government, libraries, and the public by providing access to its large collection of over a million books, newspapers, and government documents. The library also offers online resources, acts as one of four Statewide Resource Centers, and provides quick access to collections from other major libraries in Pennsylvania and worldwide.

Statewide Library Resource Center: There are four Statewide Library Resource Centers in Pennsylvania: The Free Library of Philadelphia, the Pennsylvania State Library, the Pennsylvania State University Library, and the Carnegie Library of Pittsburgh. These libraries gather significant research materials and make them available to residents across the Commonwealth. They operate under rules set by a board led by the State Librarian and its members are head librarians from each Statewide library resource center.

Statutes: The [laws](#) passed by the PA legislature. State aid, also known as the Public Library Subsidy, is paid to libraries that meet standards found in the [Statute \(24 PA. C.S. Education. Chapter 93\)](#) and the [Regulations \(22 PA Code § 131; § 141\)](#).

Strategic Plan: A written roadmap outlining where the library is headed, how it will get there, and how success will be measured. Trustees play a key role in this process by working with the library director to reflect on the library's past and present, identify goals for the future, and create an action plan to guide growth and improvement. Planning ahead helps the library stay focused, adapt to change, and better serve the community. See Funding for Good's [article](#) on strategic planning for more information.

Succession Plan: A plan that helps the library plan for leadership changes, such as when the library director leaves the organization or when board trustee officers step down. Succession planning helps ensure a smooth transition by outlining who will take over and how change will be managed.

Summer Learning/Reading Program: A fun and educational program offered by many public libraries across the United States during the summer months. These programs are designed to keep kids and families learning, reading, and engaged and usually involve a theme (such as the one chosen each year by the [Collaborative Summer Library Program](#)) and include exciting activities, special events, and contests to encourage people of all ages to read.

Sunshine Laws: ([Title 65, PA. C.S. Sunshine Act](#)): Requires any state or local government body and all sub-units appointed by that body to deliberate and take official action on agency business in an open and public meeting. More information on this act can be found on the [Office of Open Records \(OOR\) website](#).

Support Staff: Library employees who are not trained as librarians but play an important role in helping the library run smoothly. They often have technical knowledge of how the library works and assist with many tasks, from organizing books to helping library users. Common support staff roles include library aides, pages, and library services assistants. The American Library Association provides an [overview](#) of the different types of support staff jobs at the library.

Survey: A study that collects information in an organized way from a specific group of people or sources. The results of a survey are often shown in charts, tables, summaries, or reports to make the data easy to understand. For example, the Institute of Museum and Library services conducts a [Public Library Survey](#) every year to share important statistics about public libraries in the United States.

Sustainability Plan: This type of plan looks at the library's environmental impact, social contributions, and ethical governance, ensuring it positively affects both the community and the environment. [McKinsey & Company](#), a firm focused on how organizations can improve in these areas, provides a helpful overview of why this plan is important not just for the library, but for external stakeholders.

T

Task Force/Working Group: A temporary group of people from different parts of an organization or organizations who come together to work on a specific goal or project. Once the task is finished, the group is disbanded.

Technical Services: The behind-the-scenes work in a library that involves managing the library materials. This can include ordering new items, organizing them, adding labels and

covers, and keeping the collection in good condition. More [information and resources](#) about technical services is available from the American Library Association.

Technology Plan: This type of plan helps guide the library's use of technology, both current and future, to achieve its goals more efficiently. [Sterling Technology Solutions](#), a firm that provides IT consulting services, describes how this plan can move an organization forward more effectively.

Term: How long someone serves on the board of trustees.

Term Limit: The maximum number of terms a trustee can serve in a row.

TIMS: [Teacher Information Management System](#): An online platform where teachers and librarians in Pennsylvania can apply for their teaching certification, manage their personal information, and track their certification status. The PA Department of Education Division of Certification Services oversees certification qualifications.

Turnover: The rate at which employees leave the library and need to be replaced. A high turnover rate can be a warning sign of problems such as low pay, poor management, stressful work conditions, or employee burnout.

U

Underfunded: When a library does not receive enough funds to meet its goals or run effectively. Ongoing lack of funding can lead to lower-quality services and can be discouraging for both library staff and management.

Underserved: People in a library's community who do not use the library often or at all, often because of barriers to access. These barriers can include lacking knowledge about what the library offers, English being their second language, struggles with reading, health issues, or lack of transportation. Libraries can use outreach programming to better connect and support underserved communities.

Usage: How often a library item is used by patrons over a specified time period. This can include both checkouts and use of the item in the library. In public libraries, items that are not used over a period of time may be removed from the collection (also known as weeding or deselection). Tracking usage helps libraries decide what items to keep, remove, or add to the collection to better meet the needs of their community.

User Experience (UX): How a person feels when using the library's space, services, or systems. UX focuses on seeing things from the user's point of view, and considers how easy, useful, and pleasant the experience is. This [article](#) from *American Libraries* magazine provides information on the concept of UX and how impacts and improves library services.

V

Value Added: An extra feature or service provided by a library vendor that makes their product or service more useful. It improves the original feature or service and increases its value. This can include things like free training, technical support, or special tools that help the library use the product more effectively.

Vendor: A person, company, or organization that sells products or services to a library. This can include supplying library items, software, furniture, technical support, and supplies.

Volunteer: A person who helps out at the library without being paid. Volunteers often want to stay involved in the community and may do a variety of tasks based on their skills and interests.

Voting: The formal process of making a decision at a board meeting by choosing and stating a preferred option when a proposal or motion is presented.

W

Webinar: A live online session, such as a lecture, workshop, or presentation, that people can join through the Internet. Webinars create the opportunity for interaction through asking questions, sharing ideas, and taking part in discussions. [WebJunction](#) and the OCL's [PA Library Staff Academy](#) offer a variety of learning opportunities available for library staff and trustees.

Weeding: The process of reviewing library materials to decide which items should be permanently removed from the collection. This is usually accomplished using specific guidelines set in the library's collection management policy. A common method used is called [CREW](#) (Continuous Review, Evaluation, and Weeding). Weeding is also known as deselection.

Withdrawal: The process of completely removing an item from the library's collection and deleting its bibliographic record from the catalog. The item shows in the catalog as no longer being available.

XYZ

Young Adult Items: Library items for teens, usually between the ages of 12 and 18. Public libraries often have a special section just for young adult (YA) items, and can be managed by a librarian who focuses on choosing and organizing materials that interest and support teens using the library.

Young Adult (Youth) Services: Library services designed specifically for teens, usually ages 12 to 18. These services include choosing books and other materials for teens, planning programs and events, and helping teens find the resources they need. Many public libraries have a dedicated space for young adults, managed by a librarian or staff member who specializes in working with this age group.

Activities and Responsibilities: Board of Trustees and Library Director

Activity	Board of Trustees	Library Director
Legal and Policy Impact: Know the laws at the local, state, and federal levels that impact your library, including any specific policies and guidelines.	Yes , and you can ask your District Consultant and the OCL for help.	Yes , and you can ask your District Consultant and the OCL for help.
Budget Approval: Review and approve an annual budget that helps the library achieve its mission.	Yes , you are legally responsible for fiscal oversight of the approved budget, regular review of financial reports, and to engage in long-term planning in support of the mission and financial sustainability of the library. You may work with the library director to prepare the annual budget.	You can help the board create the budget and you manage the day-to-day spending of the funds. You provide information to the board of the library's financial needs, oversee the monitoring of financial transactions, maintain accurate records, and report regularly to the board on unexpected expenses or if approval is needed for major deviation from the budget.
Strategic Planning: Plan for the library's future to meet the community's needs. Decide on the library's mission, vision, and goals, and set a clear direction.	Yes , you understand the community's needs and represent the community. You should also gather input from the library director, who knows about the library's operations.	You can help with long-term planning by providing data, statistics, and information about library trends.
Board Meetings: Go to and actively participate in all regular and special board meetings.	Yes , and you should review all necessary documents before each meeting.	Yes , and you should review all necessary documents before each meeting.
Revenue Development: Create a plan to raise money for the library's current needs and future projects, and to ensure the library's sustainability. Make sure there's enough funding to achieve the library's goals and develop strategies to cover everyday costs.	Yes, you are responsible for finding money to keep the library running. This can include presenting to local government officials with an ask, assist with creating and distributing annual fundraising letters, asking for donations from community leaders and businesses, organizing special events to engage with donors, and helping with grant applications.	You can help the board by meeting with funders, creating fundraising materials, and finding and applying for grants.
Advocacy: Promote the library by talking to the public, community groups, and government officials.	Yes , and you should work together with the library director and the Friends' group.	Yes , and you should work together with the board of trustees and the Friends' group.

This document is provided as an educational resource and should not be used as a substitute for legal or financial advice. Consult your library's legal counsel or financial advisor for further guidance. Please refer to the supporting Bureau of Library Development LibGuide for the most recent version.

Activity	Board of Trustees	Library Director
Operational Decisions: In charge of making all day-to-day decisions about how the library operates. This includes managing staff, designing services and programs, and organizing the library's layout.	No.	Yes , and this includes managing the library's collection, planning services and programs, and overseeing the facility and staff. It also includes improving services to better match what the community needs and wants. You should ask the board for advice and help when needed.
Policy Development: Create and regularly review the policies that guide how the library operates.	Yes , and you can ask the library director for examples. The board of trustees needs to review and approve all library policies.	Yes , and you can help to write policies using your knowledge and experience in library management and practices.
Supervising the Library Director: Handle the Human Resources (HR) tasks related to the library director position.	Yes, the library director is the only employee of the board of trustees. The library director reports to the full board of trustees and no one trustee can direct their activities. This includes handling their job description, hiring or terminating them, evaluating their performance, and giving regular feedback.	No.
Human Resources: Handle the HR tasks for all library staff, except the library director. Look into and address any complaints or issues the staff might have.	No.	Yes , and includes writing job descriptions, the hiring and terminating, management, and evaluation of all library staff. You should be the only person delegating tasks to staff.
Volunteer Management: Oversee volunteers and review their performance once a year.	No.	Yes , and this can include board trustees who volunteer for special projects.

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