

trustee tale

Newsletter for Public Library Trustees

The Planning Process *In Brief* for a Small Library

What follows represents a planning process tailored to small public libraries, especially those that do not have a written plan. Planning can seem intimidating, too time-consuming for a board and director to take on. Often, reading the guides to planning only confirms that sense. This outline structures a process that is manageable. The process will help you think usefully about where your library is and where you want it to be, and the plan that you write will help keep those priorities in mind as you make decisions. In this issue I'll look at developing a mission statement and choosing goals. Next time we'll consider writing objectives and point to some other resources you may want to consult.

I.

Developing a Mission Statement

Why do you have a library? What is it that you want to do by having a library? Who do you want to serve? In answering these questions you may want to think about your community's resources and needs (e.g., school libraries and special programs, a significant number of older people or families with young children, churches that have reading groups), the people who live there and what they say about the library ("I'm so glad you..." or "I wish you would..."), and the history of the library (who started it? what need was it intended to address? What needs has it filled?).



For example, do you want to

- Provide popular reading and video materials for the adults in your community?
- Provide materials for pre-school children to help them prepare for school?
- Emphasize reading and video materials for school-age children?
- Provide programming for adults and/or children, e.g., book discussion groups or story hours?
- Offer a focal point for community activities, meetings, services?
- Provide some other service?

You may choose a number of these or other services, but you will want to emphasize one or two. Remember: you can't do everything.

Outcome of the discussion: Develop a one or two sentence description of the library's purpose. This should state the basic reason(s) for the library's existence. It should describe what the library is trying to do. This brief description is your "mission statement," and it can serve as a guideline for all the decisions and plans you make for the library. If you choose, e.g., to emphasize

services to pre-school children, that will have (or should have) an effect on what materials you buy, what kind of programming you do, and when you are open.

II.

Developing Goals

In light of this mission, how would you evaluate the library's present level of service? What are you doing well? What do you want to do better? What do you want the library to look like in five or ten years? At this point in your discussions you want to dream, to think big. Don't let financial or political considerations squash your ideas in the early stages of discussion. Realism can come later.

Here are some things you will want to consider:

- the library building – do you have enough space? Parking? Lighting? Access for the disabled?
- the furniture — is it comfortable? Attractive or worn? Safe or rickety? Appropriate for the activities and patrons, e.g., are there small chairs and tables for children?
- the hours — are you open enough hours? At times when patrons can come?
- Materials – are they a good mix of new, relatively new, and classic? Attractive and in good repair? Easily located? Do you have an appropriate number of items and formats for your patrons? Do you select materials to support your mission? Do you weed the collection regularly to get rid of worn materials, those no longer used, and those with misleading information, e.g., about medicine, space, or law?
- Programming – do you offer programming in support of your mission?

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- Staff and volunteers – do you have enough staff to do the work necessary in the time available? do they have the appropriate training?

Are you doing the right things well, given your mission? How can you capitalize on your strengths? Minimize or eliminate your weaknesses?

Outcome: You will want to develop a few (4-6) goals for the library. These will be general statements, e.g., in the areas of the facility, collections, programming, administration and staffing, children's services, and automation. A goal is a broad statement of what you want to do, e.g., "The Home Town Public Library will provide a rich collection of print and visual materials to inform and entertain its patrons" or "The Home Town Public Library will offer programming for pre-school children that fosters their reading interests and skills." Together, the goals will generally address all of the library's major areas of service and responsibility. They should follow from the mission statement, although they may concern specific areas of service or responsibility that the mission statement does not mention. One goal, traditionally the last one, provides for continuing to plan, "The Board and Director of the Home Town Public Library will regularly (or annually or every X years) review and revise this plan."



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Avoiding Financial Frustration

Librarians take pride in keeping books, but are not necessarily good bookkeepers. The skills needed to care for library collections are not the same as those needed to care for library finances.

Many library directors, and library boards, believe they have the problem licked by simply relying on their municipality to keep track of their finances for them. Others rely on the board treasurer to keep a close eye on the library purse.



Unfortunately, both of these methods of financial oversight have pitfalls. The governing municipality should keep track of library finances. After all, they are responsible for issuing checks on behalf of the library to pay bills. (Wis. Statute 43.58(2)). Unfortunately, many municipalities fail to provide necessary financial reports to the library board in a timely manner in order to make budget decisions. Often times, well-meaning municipal treasurers or town clerks make financial and budgetary decisions for libraries that should be decided by the library board.

Similarly, the Library Board Treasurer may be well meaning, but often times is not trained in complicated record keeping. Even those treasurers who are accountants or bookkeepers in their day jobs can sometimes be busy and hard to reach when critical financial information is needed. Library financial information kept in a private office is of little help to a director trying to make financial decisions or recommendations.

Our recommendation for all libraries, even those not currently experiencing problems, is to make sure that financial record keeping is handled at the library either by the director or another staff member. In smaller libraries, the board treasurer may work hand in hand with library staff.

The first step to good record keeping is to make sure that your budget provides adequate detail regarding annual expenditures and anticipated revenue. Insofar as possible, make sure that all potential expenditures are anticipated when writing a budget and formulating your annual request to your municipality. If you are unsure of a format, look at your last *Annual Report* filed with the state.

The *Annual Report* will ask you to report spending in several specific areas. Writing a budget using the same divisions, then keeping track of spending within those divisions, will save your director considerable agony in trying to fill out the report at the end of the year.

Each month, staff should present the board with a list of bills to be paid and request board authorization to pay them. At the same time, they should present the board with a *statement of financial control* listing each division of the budget; the total funds budgeted in each division; the amount of funds, if any, expended in that particular month; and year-

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Advocating

A trustee is the library's best and most credible advocate for excellence in library service. Trustees are knowledgeable about library issues and, as citizens, reflect the needs and concerns of the community.

Library staff, while skilled and passionate, can be perceived as having a vested interest. As volunteers, trustees' words hold weight with community leaders and government officials. It is the responsibility of the library board to support and to advocate for the library. As a group, the library board has a responsibility to:

- Be informed on local, state and national issues and legislation that may affect libraries.
- Advocate, support, defend, and speak out about library issues with citizens, government leaders, and elected officials.
- Communicate to the community on a regular basis about the library.
- Establish a marketing and public relations plan and fund the program.
- Evaluate the success of the marketing and public relations plan.

As individuals, library trustees should:

- Be well informed, vocal and visible in the community.
- Share the plans, policies and progress of the library with individuals and community groups.
- Listen to the community.
- Work closely with government officials.

The Community

The trustee is a link between the library and its community. The library board represents the needs and wishes of the community to the library director, and represents the needs of the library to the community. The community consists of many constituent groups. It is useful for the board to consider them separately even though individuals may belong in more than one group:

- Taxpayers and voters
- Library users
- Friends of the Library

- Schools
- Residents of the library neighborhood
- News media
- Businesses
- Civic organizations
- Local and state elected and appointed officials

Public Relations

Public relations (or community relations) is a planned program of communication between the library and the community it serves. The purpose of community relations is to create good will and support for the library.

Good service is the foundation for good public relations. It is everybody's job! Everyone and everything connected with the library affect its public image. Trustees have a crucial and defining role in community relations.

Ballot issues

When the library is contemplating a special levy or bond issue, it is wise to measure the opinions of the community. To achieve passage of such measures, the library needs the approval and vote of citizens who may not be library users.

Advocacy with governing officials and legislators

Local, state and federal laws affect the library. Trustees must stay informed on these matters and become involved in the political process. This means getting to know city council members, county commissioners, state and federal legislators. It means providing information to help them understand the library's needs. It also means encouraging others to express opinions on matters in which the library has an interest. It may require letter writing, phoning or visiting officials in person. Already-established relationships are invaluable when an important issue comes up for a vote.

Adapted from the Washington State Public Library Trustee Manual.

TOP TEN Action List For Trustees

Ten Things Every Library Trustee Should Do:

#10 - Give a speech about your library. Rotary Clubs, JCs, and other groups are always looking for programs and the world won't know what your library has to offer unless you tell them.

#9 - Visit another library and steal a good idea.

#8 - Don't ever stop learning. It's hard enough to keep up even when you work at it. Seek out learning opportunities which will help make you a better trustee.

#7 - Be Active! Being a trustee means more than just going to the board meetings every month. Write a letter to a governor about state aid. Take the editor of your local paper to lunch.

#6 - Spend your money wisely. Don't hoard it! Your funding bodies didn't give you tax money so that you could put it in the bank. They are buying service from you.

#5 - Never forget that it's the public's library, not the board's or the staff's. On the other hand, remember that the board governs the library, not the town board and not the Friends of the Library.

#4 - Pay your staff a decent wage. They work hard, sometimes in less than ideal conditions. Generally, library pay rates are below standards, even for the local economy.

#3 - Have a plan for your library. If you don't know where you're going, it doesn't matter which road you take. But it can be a long trip with an unsatisfactory ending.

#2 - Embrace change. Welcome it. Create it. Accept it. Make it work for the library.

#1 - Have FUN! As trustee of a library, you should love what you're doing, and it should be obvious to others.

Based on the list created by Malcolm Hill of the the Mid-York Library System, Utica, NY.

(“Avoiding Financial Frustration” continued)

to-date total expenditures. The staff and board may then use this statement as a planning document when considering future expenditures. The *statement of financial control* should provide an accounting of revenue in the same format as the accounting of expenditures.

Make sure that your director, or other staff, has a computer at their disposal away from a service desk to use for financial record keeping. There are several computer programs available that make the whole task of keeping track of the books fairly simple. A simple spreadsheet such as *Microsoft Excel* is a good start. Other programs such as *QuickBooks* from Quicken are well worth the extra investment.

The first step to ending financial frustration is getting organized. Contact your local library system for assistance in deciding what budget format is best for you. The system can also give you advice regarding the use of financial software. Spending 35 cents on a phone call will be the best investment you make.



Imperatives for Planning in the Wisconsin Public Library Standards

<http://www.dpi.state.wi.us/dlcl/pld/chapter1.html>

An excellent, brief overview of the planning process that incorporates the use of the *Standards* both to assess where the library is now and to establish goals and objectives.

OWLS Links for Librarians: Planning

<http://www.owls.lib.wi.us/info/links/plans.htm>

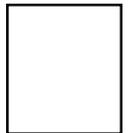
A collection of links to planning resources ranging from the general to the specific. The site includes sample plans from some smaller public libraries, as well as “54 Sample Mission Statements.”

OWLS Links for Librarians: Trustees

<http://www.owls.lib.wi.us/info/links/trustees.htm>

The Trustee Manuals from various states included on this site have sections on planning, specifically written for trustees.

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trustee tale is written and distributed by the Winnefox Library System and the Outagamie Waupaca Library System. Distribution to your board is funded by your home system.

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