N E W   C A S T L E

LIBRARY DISTRICT

HANDBOOK FOR NEW LIBRARY DIRECTORS

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Contents

Welcome to the New Castle Library District!

Being a library director in Pennsylvania is a unique and challenging position. You will need to lead and inspire staff, work with community organizations, motivate and encourage trustees, influence volunteers and sometimes even persuade government officials. You will need to be particularly competent at "people skills," especially proficient in communicating with everyone you serve and work with. In addition, you will need to be knowledgeable about budgets, advocacy and state reporting.

To get you started on this great adventure of library directorship is this general overview of information from your district consultant. Take time to read through the information and then reach out to you district consultant with any questions or to request more in-depth content on the topics shared in the handbook.

Know that you are NOT ALONE on this adventure and that you have a great support system of other administrators and consultants to lean on.
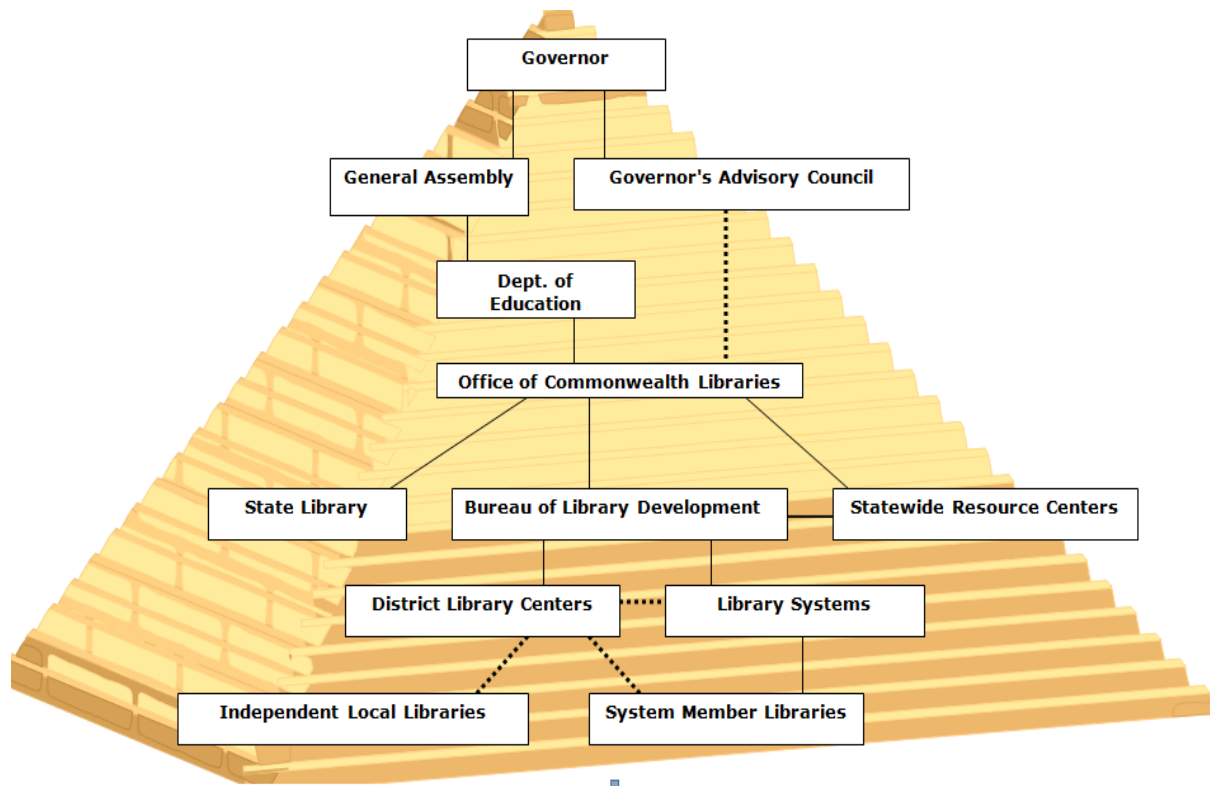
Office of Commonwealth Libraries

The Office of Commonwealth Libraries is a department within the Department of Education and leads the development of Pennsylvania's academic, school, public and special libraries to meet the information, education and enrichment needs of its residents.

The powers and duties of the Office of Commonwealth Libraries and the State Librarian are listed in Article II, Section 201 of The Library Code. The State Librarian works with the Pennsylvania Governor's Advisory Council on Library Development (GAC).

To carry out its responsibilities, the Office of Commonwealth Libraries is organized into two bureaus, the Bureau of State Library and the Bureau of Library Development.

Bureau of State Library

The Bureau of State Library's collection reflects its missions by providing extensive materials in subject areas related to state business. The State Library has also given priority to collection development in subject areas related to its designation as a Statewide Library Resource Center. The State Library's strengths include an extensive general and legal reference collection, and comprehensive collections of Pennsylvania newspapers, Pennsylvania state government publications and U.S. Government publications.

Bureau of Library Development

The Bureau of Library Development provides leadership for better library service by:

- Encouraging adoption of good management practices
- Developing and implementing comprehensive plans
- Increasing public awareness of quality library services
- Advising all public libraries and municipalities
- Advising academic, institution and law libraries
- Collecting, analyzing and disseminating statistics
- Encouraging resource sharing among all types of libraries
- Administering state and federal money

The Bureau of Library Development

- Provides a direct consulting and continuing education program to district library centers; local public, school, and academic libraries; state institution libraries and government officials covering all phases of library management and operation;

- Administers a program of state aid to public libraries and promotes sharing of library resources through a variety of cooperative programs affecting libraries statewide;

- Coordinates a program of library services to people with disabilities in Pennsylvania through designated Regional Libraries for the Blind and Physically Handicapped, operated by the Free Library of Philadelphia and the Carnegie Library of Pittsburgh;

- Administers the federal Library Services and Technology Act (LSTA) funds and the state Keystone Recreation, and Conservation Act Library Facilities Grant Program.

For more information on the structure of Pennsylvania Libraries, visit the Office of Commonwealth's Libraries About Us section of their website.

Statewide Library Resource Centers

A Statewide Library Resource Center is a library designated by the Pennsylvania Library Code to receive state aid for the purpose of acquiring major research collections. There are four statewide resource center libraries in Pennsylvania: the Carnegie Library of Pittsburgh, the Free Library of Philadelphia, the State Library of Pennsylvania and Pennsylvania State University Library. Together they comprise a vast research resource capable of meeting the needs of most Pennsylvanians. Their collections augment those of the local libraries and district centers. Materials are sent to the district centers via delivery services or they may be used at the resource center library.

District Library Centers

Currently there are 29 District Library Centers in Pennsylvania. The district center is a strong local library (or could also be a system headquarters) designated by the State Librarian to serve as a source of assistance to the citizens and local libraries within its district. The district centers receive funding to provide support services for the local public libraries in their districts. District services often include delivery, reference, interlibrary loan, continuing education, public relations, and the services of the District Consultant, who can be called on to help with any questions about being a new library director.

Other District Center staff members may also provide advisory assistance to local librarians, trustees, municipal officials and interested citizens within the district through periodic visits, district meetings and workshops, but District Consultants have the primary responsibility for this advisory assistance. They also help their local libraries develop strategic plans and assist with the development of a district plan.

The Bureau of Library Development provides advisory services to district centers by assigning a Library Development Advisor as liaison to each of them. As a rule, this "consultant's consultant" is the first point of contact with the state office. This liaison works with the district consultant to help channel and interpret information from the Office of Commonwealth Libraries to improve services to local communities.

DISTRICT LIBRARY CENTERS
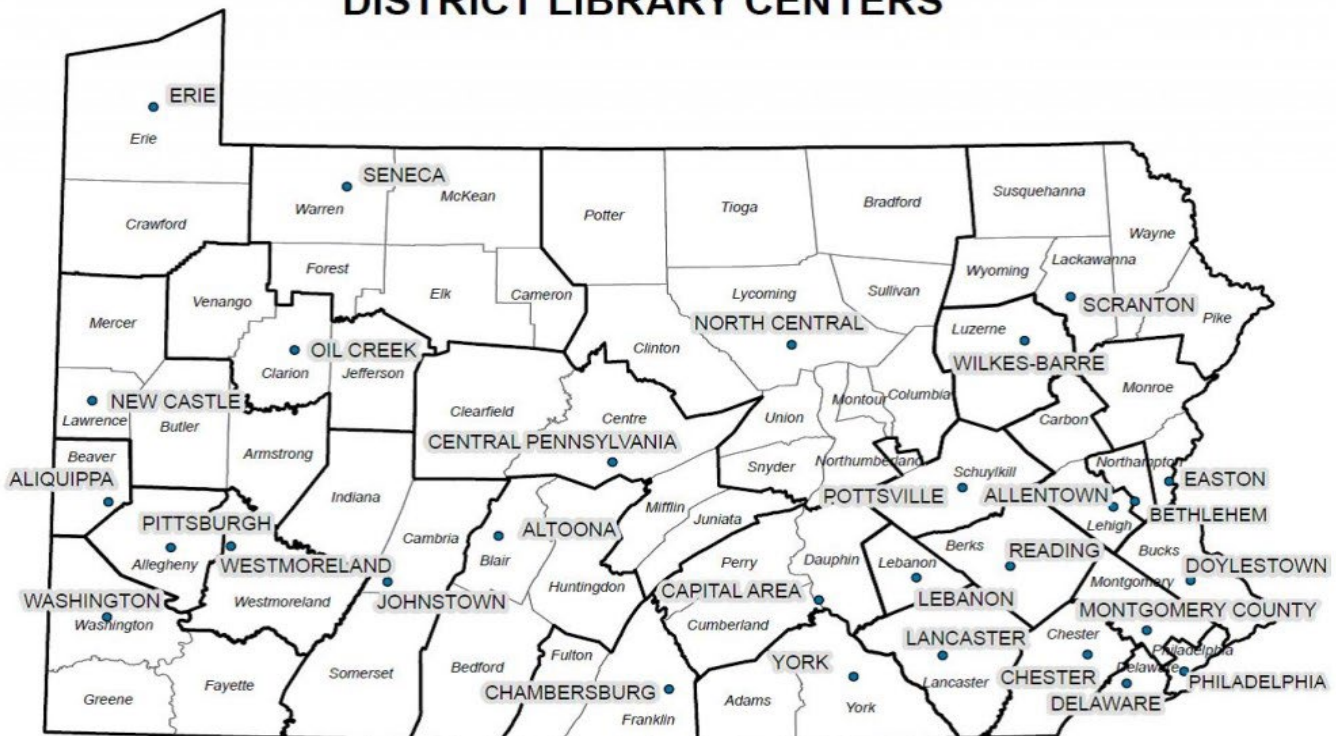
The New Castle Library District serves the libraries and residents of Armstrong, Butler, Lawrence, and Mercer Counties. New Castle Public Library in New Castle is the District Center. The District Administrator is the Executive Director of the New Castle Public Library.
*Member Public Libraries of the New Castle Library District (** denotes non-state aided libraries)*
◆ **Armstrong County:** Independent Libraries
- Apollo Memorial Library
- Freeport Area Library Association **
- Ford City Public Library
- Kittanning Public Library
- Leechburg Public Library **
- Worthington/West Franklin Community Library

- ◆ **Butler County:** Butler County Federated Library System (BCFLS)
  - ▪ Butler Area Public Library (System Headquarters)
  - ▪ BCFLS: North Trails Public Library
  - ▪ Cranberry Public Library
  - ▪ Evans City Public Library
  - ▪ Mars Area Public Library
  - ▪ Prospect Community Library
  - ▪ Slippery Rock Community Library **
  - ▪ South Butler Community Library
  - ▪ Zelienople Area Public Library

- ◆ **Lawrence County:** Lawrence County Federated Library System (LCFLS)
  - ▪ Ellwood City Public Library
  - ▪ F.D. Campbell Memorial Library
  - ▪ LCFLS: Bookmobile
  - ▪ **New Castle Public Library (System Headquarters/District Center)**

- ◆ **Mercer County:** Independent Libraries
  - ▪ Community Library of the Shenango Valley (CLSV)
  - ▪ Greenville Area Public Library
  - ▪ Grove City Community Library
  - ▪ Lakeview Area Library **
  - ▪ Mercer Area Public Library
  - ▪ Stey-Nevant Public Library – Branch of CLSV

District Services

District Library Centers are allocated an appropriation of state aid on a per capita basis in support of services they provide to libraries in each district. In exchange, Commonwealth Libraries requires that each District Library Center (DLC) meet certain minimum standards.

Services provided by New Castle Library District to member libraries include:

- ◆ Consultant Services
  - ▪ District Consultant – The New Castle Library District employs a district consultant who is a liaison to the Office of Commonwealth Libraries, and is a resource for library directors, system administrators, boards, municipal officers and other interested individuals and groups. The district consultant helps orient new library directors, helps libraries through the strategic planning process, provides information and resources of interest to boards and directors, provides continuing education opportunities, and makes yearly visits to member libraries, among other duties.
  - ▪ IT services – The New Castle Library District provides IT support to assist with advising, purchasing, installing, and upgrading your library's computer/server resources.
  - ▪ Reference – Reference staff of the New Castle Public Library are available to assist member libraries in answering patron's questions and in developing and maintaining reference and non-fiction collections.

- Youth Services – Youth Services staff of the New Castle Public Library assist member libraries in developing children's and young adult collections and programming as well as coordinate dissemination of statewide youth services initiatives.

◆ Interlibrary Loan Services
- Lends materials to member libraries from DLC collection
- Obtains materials not at the DLC from other libraries in the state and nation
- Delivers materials to libraries within the district via IDS and district delivery vehicles

◆ Cataloging Services:
- Assists local libraries with cataloging questions and concerns
- May create original cataloging records for hard to find/local author titles

◆ Collections:
- Provides online databases and e-resources to district libraries; current databases include:
  - OverDrive: database of e-books and audiobooks
  - Turtor.com: Online "live" tutoring for Kindergarten age through Adults
  - LibraryAware: Marketing and Readers' Advisory tools – Tutorials can be found here:
  - Ancestry: Each library can provide free access to the Ancestry website in their building.
- Financially support the Library-by-Mail program available from any member library facility

More information about services and resources available from the New Castle Library District can be found on the District Website.

Federated Library Systems (Butler County Federated Library System & Lawrence County Federated Library System)

Library systems are groups of libraries within a county that join together for financial support and to improve the level of service provided to all users within their service areas. Thirty-three of Pennsylvania's 67 counties are served by a county library system. Examples of services offered by systems are: coordinated activities to increase financial support for system members, countywide automation, Internet access, and other technology support, coordinated planning for and evaluation of services, resource sharing among the libraries in the system, in-service training for system library staff and trustees and services to the localities in the service area that do not have designated local libraries. Each federated system has a system administrator who coordinates system activities and oversees the system budget. In some cases, a system administrator may also be the director of a library within the system. System members benefit from the expertise of a system administrator who can act as a resource for library directors. The Association of Pennsylvania Public Library Systems (APPLS) supports county system administrators. Each system also has a system headquarters library that has to meet higher standards for collection and hours of operation.

Libraries with Branches

A main library with branches is considered one library. The library may have a Chief Executive Officer, Library Director, and Branch Managers. They are governed by one board or in some cases, an advisory board if the library is a part of county or city government. Currently, the Community Library of the Shenango Valley has a branch (Stey-Nevant Public Library) and the Butler County Federated Library System has a branch (North Trials Public Library).

Local Libraries

Public libraries play a key role in their communities as centers for lifelong learning and community hubs. They offer educational and cultural enrichment opportunities for all residents of their service areas by providing relevant materials, services and programs. Lifelong learning is for all ages – from infants to senior citizens.

Toward that end, the local public library has the responsibility for providing a basic collection of up to date materials in a variety of formats. A local library's collection development policy will dictate what items are collected. These might include books, pamphlets, magazines, newspapers, audio recordings, computer related materials and services (including Internet access and database resources), pictures and microfilm. The collection of each local library also includes the resources available through the state's POWER Library databases and other online resources provided by the New Castle District and your System (if in Butler or Lawrence County).

Public libraries provide a variety of services such as reference, interlibrary loan, children's activities, services to the underserved and programs for all ages. The local library looks to its community for what service needs are required and plans for growth and a successful future. The district library centers play a vital role in the success of the local libraries in their geographic areas of responsibilities. The District Center is a resource for library directors.

Library Services and Technology Act (LSTA)

Through Congressional allocations, LSTA funds are made available to each state for purposes deemed important in that state. The federal Institute of Museum and Library Services (IMLS) distributes these funds, based on a population formula, to meet IMLS goals.

Structure: IMLS annually awards money to states that have submitted an acceptable Five-Year Plan for spending the money for library services consistent with the goals of IMLS. The LSTA law defines what the funds may be used for and the Office of Commonwealth Libraries' Five-Year Plan reflects those purposes.   You can find out more about IMLS, their grant programs and related news online via their website.

Keystone Grants

Your library needs to be a warm, welcoming space, with places to relax and enjoy the many aspects of library activities connected to learning, conversation and programs. Ideally, a library will have separate, interesting and exciting areas for teens, for children, and for older adults. You will want quiet areas, conversation areas and a community room that is large enough to accommodate a great number of library programs. The community room is your place to showcase how valuable the library is, because you can market the fascinating activities that are presented in this room, and you can emphasize the role the library plays in learning and literacy. One way to improve your facility is by applying for a Keystone Fund Grant.

The Keystone Recreation, Park and Conservation Fund was established by an act of the General Assembly in 1993. The Department of Education, through the Office of Commonwealth Libraries, Bureau of Library Development, administers the public library portion of this program which is funded from a portion of the realty transfer tax. The Keystone Fund provides grants to municipalities for planning, acquisition, development, and rehabilitation of public library facilities. Municipalities may only apply for public libraries that are participating in the State Aid Program.

Grants are awarded through a competitive application process and must be matched dollar-for-dollar. Matching funds may include cash, in-kind contributions, federal funds and other state funds. State aid may not be used as match for a Keystone Grant.

The Office of Commonwealth Libraries issues information about upcoming grant rounds to public libraries and municipalities as the funds become available. Grant rounds are typically offered every two years. Grants of up to $750,000 have been awarded to assist libraries with ADA accessibility upgrades, roof replacement and other small construction and non-routine maintenance projects, as well as, additions to existing buildings, major facility renovations, and the construction of new library facilities.

Visit the Office of Commonwealth Libraries [Keystone Recreation, Park and Conservation Fund](#) webpage for current grant information.

Library Code and Regulations

The Library Code, passed in 1961, set up a system of local libraries, district library centers, and regional resource centers. It provides state money to support this system and to stimulate local funding of public libraries. The Library Code defines what a library is and how it is governed. Title 22 of the Library Code contains the regulations that further define and implement the Library Code. The regulations have the force of law. They contain basic and minimum standards, library system standards and district library center standards.

The Public Library Code (2012) is a continuation of the Act of June 14, 1961, known as the Library Code. The library regulations at present define how many hours a library should be open according to the population the library serves. However, the new (2012) code specifies that libraries must be open 45 hours per week. The Public Library Code is new, but as of this writing, there are no new regulations to define and shape the code. The Governor's Advisory Council in cooperation with the Office of Commonwealth Libraries are in the process of revising the regulations to fit the new code and to provide some flexibility as library services evolve in the coming years. The Public Library Code and regulations can be found under the [Laws & Regulations](#) section of the Office of Commonwealth Library's website.

New directors will want to familiarize themselves with the Library Code and regulations. The Code and regulations are complex and the district consultant can help interpret them.

State Aid – Public Library Subsidy

The following provides a brief description of the seven categories of state aid that are part of the state aid formula as determined by the Library Code. The formula has actually not been run since 2002-2003. Since then library systems and independent libraries have received a percentage increase or decrease reflective of the increase or decrease in the state appropriation for the Public Library Subsidy.

Quality Libraries Aid

- ◆ Eligibility
    - ▪ Required Local Financial Effort of $5 per capita for service area.
        - ▪ Local Financial Effort - "…Sum expended annually by a local library…which derives from local taxes, gifts, endowments and other local sources…and which is used to determine eligibility for State-aid." --- The Library Code, Section 302 (3)
    - ▪ Meet Quality Libraries Aid Criteria (Library Code).
    - ▪ Meet Basic Standards (Library Regulations).

- ◆ How Is It Calculated?
    - ▪ Based on library service population.
    - ▪ Multiplier determined by State Aid appropriation.
    - ▪ The 2002-03 payment was $1.82 per capita.
    - ▪ $1.82 X Population = Quality Libraries Aid.
    - ▪ For example, a library serving 10,000 people receives $18,200 in Quality Libraries Aid.

Incentive for Excellence Aid

- ◆ Eligibility
    - ▪ Library or system must expend over $5.00 per capita in local financial effort. The incentive starts at $5.01
    - ▪ Meet Quality Libraries Aid Criteria and Basic Standards
    - ▪ Meet Incentive for Excellence Aid Criteria and Minimum Standards

- ◆ How Is It Calculated?
    - ▪ Incentive for Excellence Aid is paid on a per capita basis on a two-tiered level. In 2002-2003 the aid was paid as follows:
        - ▪ Tier 1: $5.00 - $7.50—Paid 80% return on the $2.50 per capita in this tier.
        - ▪ Tier 2: $7.51 - $15.00—Paid 6.5% return on the $7.50 per capita in this tier.

- ◆ Incentive for Excellence Aid Financial Requirements - To qualify the library or system must:
    - ▪ Maintain its local financial effort.
        - ▪ *The Library Code, Section 303.5 (D)* Local Financial Effort: "A local library or library system shall not use Incentive for Excellence funds to reduce its financial effort for normal, recurring operating costs from a previous level unless evidence of substantial curtailment of financial ability of the community is accepted by the State Librarian." *The Library Code, Section 303.5 (D).*
    - ▪ Maintain its local government income.
        - ▪ *The Library Code, Section 304 (D)* Local Government Income: No plan for the use of Incentive for Excellence funds shall be approved if it projects a decrease in local government support for normal, recurring, operating costs from a previous level unless:
            - • The State Librarian determines that the decrease is directly attributable to a gift or endowment to a library
            - • Or that there is a substantial decrease in the financial ability of the municipality … *The Library Code, Section 304(D)*

County Coordination Aid

Purpose of aid is to implement plan for countywide services for county residents. Funding based on classification of county and amount of county appropriation for libraries:

Class	Percentage Match
2	5%
2A & 3	30%
4 & 5	50%
6 - 8	100%

County Coordination Aid is in addition to Incentive for Excellence Aid. County appropriations are the only type of library income that is matched twice. County funding guarantees that all residents of the county receive free library service.

Because this line item of state aid is not yet fully funded, all classes of counties above except 8th class received 54% of the aid when the formula was last run in 2002-2003. The funding formula has been frozen since 2002-2003.

District Library Center Aid

District Centers are public libraries from across the state that have significant collections and are able to provide services to local libraries. There are 29 District Centers in Pennsylvania. Services include interlibrary loan, reference, delivery, and advisory services. District Centers must meet District Library Center Standards.

Statewide Library Resource Center Aid

There are four major research libraries in the state that provide assistance to local libraries. They are:

- Penn State University Park
- Carnegie Library of Pittsburgh
- State Library of Pennsylvania
- Free Library of Philadelphia

Services include interlibrary loan, reference, electronic reference, and digitization.

Equalization Aid

The purpose of Equalization Aid is to provide special funding for libraries in economically distressed areas of the state. Public libraries qualify by meeting any one of the following three economic indicators:

- Market value below the 5th percentile of all municipalities, as certified by the Tax Equalization Board

- County having personal income per capita below the 15th percentile of all counties, as certified annually by the Department of Revenue.
- County having an annual average unemployment rate above the 70th percentile of all counties, as determined annually by the Department of Labor and Industry.

Equal Distribution Grants

Libraries, branches, and bookmobiles that meet Basic Standards are eligible.

For more information, the State Aid to Public Libraries section of the Office of Commonwealth Libraries Website.

Pennsylvania Public Library Data Collection (aka Annual Report)

In order to receive State Aid, state aided libraries are required to submit an annual financial and statistical report to the Office of Commonwealth Libraries every year. Among the numerous questions asked on the PA Public Library survey, many are about how the library's budget was spent. Each year, the board will develop the library's annual budget with input from the library director. Libraries should track finances using QuickBooks® or other similar software. It is recommended that budget line items conform to the questions asked in the required annual Pennsylvania Public Library Survey as this eases the process of reporting to the Commonwealth each year. Currently, data is submitted through the pa.countingopinions.com website; typically requesting the information in January/February for completion by March/April. Your district consultant will be working with you closely during this time to assist you with the completion of this document. Please ensure that all support documents requested by your consultant be submitted in a timely fashion for all deadlines to be met.

Summer Quest Report

Pennsylvania participates in the Collaborative Summer Quest Program. Summer quest manuals are provided by the state as of 2020. Libraries are required to complete the summer quest report after the end of the program each summer. The report collects the following types of data: number and ages of participants, outreach programs, number and type of events/activities, how reading progress is measured and recorded, publicity, and participant surveys.

Application for State Aid

The Application for State aid must be made in accordance with instructions provided by the State Library and is usually submitted to the Office of Commonwealth Libraries in September/October.

Plan for the Use of State Aid

The library's plan for spending of state funds includes Quality Libraries Aid, Incentive for Excellence Aid, Equalization Aid and Equal Distribution Aid. The plan includes local government support and how the State funds will improve the quality of services of the library. A payment of State aid may not be made until the library submits a plan for its use in accordance with instructions provided by the State Library and until the plan is approved by the State Librarian. Typically, Plans for the Use of State Aid are submitted along with the Application for State Aid in September/October. As you are completing your Plans for the Use of State Aid, please keep in mind the legal restrictions on the use of State Funds as found in the PA Library Code Regulations section § 141.12.

Prohibited expenditures of State funds.

State funds shall not be expended for any of the following purposes:

- Payment of rent to any municipality or to the library board of directors.
- Investment purposes, including stocks, bonds, long term notes, real estate for income or appreciation or any expense in connection with such real estate already owned, or for any other purchases for long term income or capital appreciation.
- Any library expenditure prohibited under The Library Code (24 P. S. §§ 4101-4503 *et seq.*).

Audits

An audit is required every year if the library's state aid (plus any Keystone, DCED, DCNR or other state grants) amounted to $50,000 or more. Libraries receiving less than $50,000 annually in state aid are only required to submit an audit every three years, with a financial review in the intervening years.

Local Funds & Grants

There is no clear model of funding on the local level for public libraries. Some public libraries have a dedicated library tax from the municipality in which they are located, a few receive an appropriation from municipalities, and others receive no funding at all from local municipalities. Public libraries typically receive donations in the form of memorials and direct donations. Memorial funds are usually used for purchasing books and a plaque with the names of the donor and the honoree is placed in the book. Other memorial funds may be used to purchase furniture and/or equipment. These funds are usually restricted for that purpose. The library may receive donations that can be used for operating expenses. It's important to know the difference. Many libraries conduct an annual appeal or other fundraising activities. Understanding how the library is funded is important for every library director. Work with your library board treasurer and/or bookkeeper to learn all the ways your library is funded.

Budgeting

The library's annual budget should be developed by the library director with input from the staff and library board's finance committee. Libraries should track finances using an accounting software like QuickBooks®. It is recommended that the library's budget line items conform to those used in the state annual report. This eases the process of reporting to the Commonwealth and creating annual reports with common frames of reference. Because this information is critical to the operation of the library and may need to be accessed by others, all financial materials should remain in the library at all times.

Fundraising

Fundraising takes shape in many different forms from annual letter writing campaigns to one-time social events. Creating a Fundraising Plan is a great place to start. Here is great information from Vanessa Chase Lockshin, on her website thestorytellingnonprofit.com.

Fundraising Ideas for Libraries - *https://www.thestorytellingnonprofit.com/blog/fundraising-ideas-for-libraries/*

Main points from the article include:

- Creating a fundraising will help you get organized, get strategic, and take consistent action
- Library needs more than book sales, bake sales, and community fundraising events
- Libraries need to be able to clearly articulate the organization's needs to donors
- Identify your funding needs
- Identifying your potential donors by creating an audience profile to succinctly describe your current and potential donors
- Create a case for support that communicates to donors why making a donation matters and what impact it will have
- Develop strategies for library to build relationships
- Create the library's tactical fundraising plan – how you'll execute the strategies

For more tools and resources on Fundraising, visit the following pages on the District Website:

- ◆ [Fundraising Tools](#)
- ◆ [Fundraising Ideas](#)

Grants

- ◆ **E-Rate -** The Universal Service Schools and Libraries Program, commonly known as the E-Rate Program, helps ensure that schools and libraries can obtain Internet access at affordable rates. The library may be applying for E-Rate to offset these costs. Discounts are based on how many students in the local school district are eligible for the National School Lunch Program. E-Rate training is conducted periodically. The [E-Rate in Pennsylvania website](#) is a good starting point for learning about E-Rate and its complexities. Sign up for the state listserv by sending an email to jtschell@comcast.net.
- ◆ **IMLS -** The Institute of Museum and Library Services periodically have grants available for library programs and continuing education opportunities. Visit the [IMLS website](#) for up-to-date grant offerings.
- ◆ **NEH -** The National Endowment for the Humanities periodically have grants available for library programs and continuing education opportunities. Visit the [NEH website](#) for up-to-date grant offerings.
- ◆ **Other Grants -** There are several other organizations that provide grants for small and large libraries. Please visit the district website's [Grants page](#) for a list of other opportunities.

Library Director Roles & Responsibilities

Certification

Pennsylvania requires state aided libraries to hire certified library directors according to population:

- **Library assistants** shall have two years of college education (51 credits at least) in addition to 9 credit hours of library science courses for a total of 60 credits. (Library service population under 9,999.)
- **Provisional librarians** shall have a 4 year college degree and 12 credit hours in Library Science. (Library service population between 10,000 and 19,999.)
- **Professional librarians** shall have a 4 year college degree in addition to one or more academic years of professional library education. (Library service area population over 20,000.)

Library assistants and provisional librarians may obtain the required credits through ALA accredited master's degree programs such as those at Clarion University, Drexel University, or the University of Pittsburgh in Pennsylvania. ALA accredited programs from other states are acceptable. Another less expensive option is the certificate program at Northampton Community College. Professional librarians must gain their credits from an ALA accredited program or from an approved Office of Commonwealth Libraries program.

TIMS/PPID - All applications for librarian certification must be submitted to the Pennsylvania Department of Education through **TIMS (Teacher Information Management System).**

Public Library Certification Instructions can be found on the Office of Commonwealth Libraries website.

Duties and Responsibilities

- All Day-to-Day Operations.
- Hire and supervise all staff members.
- Recommend and draft policies for board action. Carry out adopted policies, delegating to staff as needed.
- Work with board to prepare annual budget
- Maintain an active program of public relations and public information.
- Keep abreast of local and state laws. Keep board informed of pending legislation, library trends, developments and standards.

Leadership/Communication

The Board hires the library director, but the director is responsible for hiring, managing, and potentially firing, other staff members and volunteers. Keep the lines of communication open at all times for a successful working relationship. Asking for their suggestions at times and following through with their ideas will help maintain an upbeat culture. Give them positive feedback on jobs well done. Be sure the staff has up-to-date job descriptions, give performance evaluations annually, and document, in writing, priorities and expectations.

Watch the Working with Library Boards webinar from the State Library of Pennsylvania's PA Library Staff Academy to help build a strong relationship with your library board.

Collection Development/Evaluation/Weeding

Library directors need to be involved in the identification, selection, acquisition, and evaluation of the library's collection of resources for a community of users.   Your involvement includes writing collection policies, weeding the collection, dealing with challenges to materials, monitoring the condition of materials, and making decisions about preservation and conservation.

ILS (Integrated Library System)

An automated library system usually consists of a number of functional components, such as acquisitions, circulation, cataloging, serials, and an OPAC. In an integrated system, all of the functional components share a common bibliographic database. There are many vendors of integrated systems; please talk with your system administrator (if applicable) or your district IT consultant to help identify your ILS. As the library director, you should monitor the effectiveness and accessibility of your ILS to determine if changes are necessary.

For a list of Best Practices and other checklists for library directors, please visit the Library Director Information page of the District Website.

You and your board are a team that moves your library forward in continuous improvement. Together you will establish policies, plan the budget and make decisions that will result in positive growth. The relationship you have with your library board may vary throughout your tenure as board members change. Remember, the board has one employee – you – and that you are in charge of supervising the remaining staff members. You oversee library management from a daily perspective and the board is more concerned with ensuring the library's financial success both now and for the future.

Administrative Support for the Library Board

The library director plays an important role in preparing for and ensuring effective library board meetings. The director will play a key role in the initial development of the library budget and will provide support to the library board in the development and adoption of library policies. As the library faces new issues that impact it, the director prepares background materials and presents options and recommendations for dealing with those issues. The director should make the library board aware of library laws and other laws that pertain to their actions so that the laws will not be violated.

Leadership Issues

A library director must be an effective leader if the library is to succeed and improve its service to the community. The library board also has a leadership role. At different times and in different situations, the director or the library board will play the primary leadership role. The job description and library policy statements will often define the situations in which the library director is expected to lead. The director plays a leadership role by motivating and supporting library staff and volunteers, by being active in the community, by representing the interests of the library in state level forums on library issues, and by keeping the library board informed about opportunities for improving library services. The library board will often play the primary leadership role in dealings with local and/or county government. Both the director and the library board lead by advocating for better financial support for the library and keeping the community informed of library developments. While the director always needs to be prepared to lead, there needs to be a clear understanding of and respect for the board's statutory leadership authority and responsibility.

Communication with the Board

It is the job of the library director to keep the library board informed of what is going on in the library, of the needs of the library, of problems the library is and will be facing, and of the upcoming issues that will be impacting the library. At every library board meeting, the director should report to the board on these matters. If a crisis arises relating to the library, it is important that the library board chairperson and other board members are alerted as quickly as possible.

Director and Board Relationship

The director will want to work to develop a positive relationship with the library board. A relationship in which there is mutual trust, respect, and support will greatly benefit the library. It is very important that directors take time to get to know each board member and his or her style, perspective, and special concerns and interests.

As in any relationship, there will be times when the director and the library board disagree on certain things. These disagreements should be handled in a professional manner. Discussion should be focused on issues and not on personalities. The library director should make the case for a position as effectively as possible, but should not overstate or be inflexible in that position. In the end, it is the library board that will make the final decision about library policy issues and service priorities.

Although uncommon, there is the possibility of a severe disagreement between the director and the library board. In some instances, directors may feel strongly enough about an issue to want to comment publicly about it. If this occurs, the director may wish to seek advice/mediation from an outside party such as the district administrator, the district consultant, or under some circumstances an attorney.

Board Development

It is in the best interest of the library to have board members who are dedicated, effective, who understand the value of the library, and who are committed to the mission of the library. Board members should be representative of the community and should represent as many of the community's interests as possible. The makeup of the library board should represent skills the library needs to move forward. Directors play an important role in the recruitment of new board members with these qualities. This role includes identifying library users and members of library support groups who have exhibited strong support for the library and leadership qualities. The names of these individuals should be brought to the attention of the library board. To ensure the appointment process proceeds effectively, the director should keep track of board member terms.

Serving as a library board member is a complex and demanding position. Doing a good job as a library board member requires knowledge of a wide variety of issues. Library directors play an important role in the continuing education of the library's board members. Well-educated and trained board members will make the job as library director much easier. The education of library board members begins with an effective orientation (see below). Board meetings can be used as opportunities for educating board members on their responsibilities and on important local, state, and national library issues.

Some library districts can assist in trustee continuing education and often provide workshops for trustees. The Office of Commonwealth Libraries is providing Trustee Training in various places across the Commonwealth. If the District does not have contact information for your board, the information is sent to the library directors to pass on to their boards.

All new library board members should receive an orientation. The orientation should take place, if possible, prior to the first board meeting for the new board member. The library director, the library board chair, and possibly other library board members and staff will participate in this orientation. The library director will need to assemble a variety of background and resource materials for the orientation session. These include, among other items, the board's by-laws, previous board minutes, the library's most recent annual report, and the library's long-range plan.

Sample Trustee Orientation Checklist

- By-laws and format of library board meetings
- Expectations for library board member participation
- The library's long range and/or strategic plan
- Review of current issues facing the library
- The library's budget and financial situation
- Library board powers and relationship with the municipality and/or county
- Open meeting requirement
- Role of the library director
- District Membership/Agreement & County Membership/Agreement
- Policies on the selection and review of library materials
- Other library policies
- Friends of the Library information
- List of contact information for current board members

For more Tools and Resources concerning Library Boards, please visit the Board of Trustees section of the District Website.

Job Descriptions

All library employees should have job descriptions that list the essential duties of each position, any education and experience required, the physical and mental requirements of the job and the salary range. These components should be reviewed and updated regularly. Job descriptions should comply with the Americans with Disabilities Act, the federal Fair Labor Standards Act, and any state statutes regarding fair employment practices.

Having an employee handbook or personnel policies is important to lay out expectations and to inform employees of policies and procedures. (See appendix for sample employee handbook outline).

Evaluations/Review

Employees are an integral part of fulfilling the mission of your library. An annual review/evaluation should be completed to provide feedback to employees on their contribution in support of the mission. The evaluation/review will also provide employees with constructive comment regarding development needs as well goals to achieve in the coming year.

The purpose of an employee review is not to 'fix' behavior once a year. If an employee has poor behavior, less than adequate performance or attitude problems, don't wait a year to fix them. Regular on-going coaching cannot be replaced with an annual employee review.

Advantages of reviews:

- They give the employee the opportunity to better understand expectations, standards and rules.
- They give the manager an opportunity to 'get to know' the employee better.
- They give the employee the opportunity to learn what behaviors and attitudes they need to improve or modify.
- They send a message to the employee that you care about their performance as well as them as a person.
- They can help you chart a better course for the future of the employee.
- They can help the manager identify weaknesses and strengths that may not have surfaced on a day by day basis.

Hiring/Firing

A library should have written employment policies, including hiring/firing procedures and directors should follow them consistently.

- ◆ **Hiring:**
  - ▪ Do not discriminate based on race, color, gender, religion, disability status, etc.
  - ▪ Respect the applicant's right to privacy: marital situation, economic background, personal life
  - ▪ Don't imply things that can't be delivered: job security, benefits
  - ▪ Observe all laws relating to minimum wage, hiring young or immigrant workers
  - ▪ Follow the IRS guidelines for hiring independent contractors
  - ▪ Follow all IRS and State new hiring requirements
- ◆ **Firing:**
  - ▪ Do not fire an employee in anger
  - ▪ Follow policy – Be respectful
  - ▪ Document reasons for discharge
  - ▪ Include an observer
  - ▪ Use a termination letter

For more information concerning HR, please visit the Human Resources section of the District Website.

Continuing Education

Training is a key component in the professional growth of a library director and the director's ability to cultivate good library service. Ideally, commitment to training will be a goal shared by both the library board and director. Library budgets should contain specific line item funding for staff development. Additionally, the library director should be aware of other free and affordable training and learning opportunities.

Library directors of all state-aided libraries are required to have eight hours of continuing education per year. If your library receives Incentive for Excellence aid, along with the library director, all staff working twenty hours per week or more are required to have six hours of continuing education every two years.

Pennsylvania librarians, staff and trustees have access to free online courses and webinars that provide continuing education credit. WebJunction offers course topics that are varied and practical. Some topics include: customer service, communication (such as "Communicate with Confidence" and "Delivering a Presentation"), library services (such as reading advisory and children), management, adobe applications, and technology. To access the courses and other useful information go to the main WebJunction website or select "Go to Courses" to explore the available resources.   You will also find available continuing education opportunities on the PA Library Staff Academy site through Niche Academy. You should have immediate access if your email address has a library domain. Staff without a public library specific domain (Gmail, Hotmail, yahoo etc.), will be asked to email the academy administrator for access. Those requests should go to RA-EDTraining@pa.gov.

The Pennsylvania Library Association (PaLA) offers a yearly Professional Development Conference. Visit the Annual Conference page of the PaLA website

More continuing education resources can be found on the District Website under Workshops & Webinars and Competencies & Guidelines sections.

Collection Development Policy

This critical policy is used by library staff to select, maintain, preserve, and weed materials. It can also serve as a tool to acquaint the public with the principles of collection development and intellectual freedom.

A collection development policy should include the following:

- Materials Selection
- Gifts and Memorials
- Weeding and Discarding
- Reconsideration of Materials
- Local/Pennsylvania History
- Genealogy Collection

Personnel Policy

The hiring, training, supervision, motivation and evaluation of staff are key factors in developing high-quality library service. A personnel policy provides the framework for creating a positive workplace environment.

- A personnel policy should include the following:
- Recruiting/Hiring
- Salary and Benefits
- Code of Conduct
- Evaluation Procedures
- Discipline/Termination
- Jury Duty
- Attendance/Leave/Holidays
- Grievance Procedure including whistleblower/non-retaliation protection
- Continuing Education/Professional Development
- Equal Employment Opportunity Statement
- Harassment
- Resignations, Retirements, and Dismissals
- Volunteers
- Clearances/Mandated Reporter

Circulation Policy

This policy ensures equal access for all to the library's materials and services. At the same time, it ensures that some borrowers don't abuse privileges to the detriment of others. In an era of increased resource sharing, agreements with other libraries and consortia should be referenced and their benefits briefly explained.

Acceptable Behavior Policy/Code of Conduct

Although by design this type of policy contains some restrictions, its overall purpose is intended to be positive. It sets forth the library's commitment to providing an atmosphere where people of all ages and circumstances feel welcome and safe.

Document Retention Policy

A Document Retention Policy is designed to outline the procedures for the retention, storage and disposal of certain records that correspond to local, state and federal mandates. See the District Website for a sample [Document Retention Policy](#)

In general, the following records should be kept permanently at the library:

- Articles of Incorporation
- Audit reports, from independent audits
- Corporate resolutions
- Determination Letter from the IRS, and correspondence relating to it
- Financial statements (year-end)
- Insurance policies
- Minutes of board meetings and annual meetings of members
- Real estate deeds, mortgages, bills of sale
- Tax returns

Universal Grant Guidelines Policies/Procedures

Before applying for certain grants, especially a Library Services and Technology Act (LSTA) grant, all grant applicants must comply with federal Uniform Administrative Requirements for grants (2 CFR §200.300 - §200.345). This means that all applicants must have written:

- Cash management procedures that establish LSTA fund controls and accountability, including written procedures for determining the allowability of costs under the terms and conditions of the LSTA award (2 CFR §200.302(b)(6), §200.302(b)(7), §200.305).
- Bid and procurement procedures that establish standards and controls for the purchase of all goods and services, including written procedures for the evaluation of the proposals received and for selecting awardees (2 CFR §200.319(c), §200.320(d)(3)).

- Conflict of interest policy that governs the actions of its employees and board members who engage in the selection, award, and administration of contracts, including disciplinary actions if the policy is violated (2 CFR §200.318(c)).
- Travel policy (2 CFR §200.474(b)).
- Compensation and fringe benefit policy if any federal funds are used for compensation and fringe benefits (2 CFR §200.430(a), §200.431(a), §200.464 [Relocation Costs of Employees]).
- Indirect cost rate development procedures if an indirect cost rate other than 10 percent has been negotiated directly with the federal government. (2 CFR §200.414, §200.331(a)(4), Appendices).

Please contact your District Consultant for sample policies and procedures.

Other Policies

The following policies may not all be pertinent to your library and is not an all inclusive list; however, you should work with your library board and staff to determine if you have, or need these policies.

- Board Policies:
    - Bylaws
    - Governing Body
    - Officer & Committees
    - Meetings
    - Duties and Responsibilities of the Board & Library Director
    - Trustee Job Description
    - Code of Ethics
    - Conflict of Interest
    - Whistle Blower
- Public Services Policies:
    - Exhibit/Bulletin Boards
    - Meeting Room Facilities
    - Latch-Key Kids/Homeless
    - Behavior
    - ADA Compliance
    - Public Access and/or Internet (include CIPA compliance-Children's Internet Protection Act)
    - Confidentiality of Records

- Circulation/Borrowing Policies
  - Library Card Registration
  - Interlibrary Loan
  - Library Hours/Holiday
  - Loan Periods
  - Fees/Fines
- Advocacy Policy
- Fund Development Plan
- Emergency Preparedness
- Bid and Procurement Procedures
- Cash Management Procedures
- Library Bill of Rights
- Intellectual Freedom Statement

Mission/Vision

The mission statement, tailored to meet the needs of the community, establishes the library's purpose, values, and beliefs. The mission is why the library exists.

A well-designed mission statement will:

- Guide choices and help set priorities
- Spotlight the benefit of the library to the community
- Establish the library as a valuable asset to the community

The trend is for the mission statement to be short, sincere and simple. Employees and staff must believe in and be able to support the values expressed in the mission statement.

Strategic Planning

Strategic planning is a shared responsibility between the library board and library director. A clear, concise plan provides the community with a road map to the library's development. It distills the vision of what the library hopes to accomplish during a specific time period, usually three to five years. Most importantly, it describes the goals, objectives, activities, and outcomes within each service area and provides a step-by-step account of how the library will achieve this vision.

Components of an effective strategic plan:

- Mission Statement - the library's purpose, values, and beliefs
- Vision Statement – a description of the library's desired future state
- Values Statement – the principles on which the library is built, and that guide its planning, operations, and programs
- Goals and Objectives – answers the question, "What do we want to accomplish?"
- Strategies – approaches or activities needed to achieve goals and objectives
- Implementation – library's "user's guide" to the strategic plan

Technology Plan

A technology plan outlines in detail what technology projects the library intends to take on and how these projects will be completed. Done well, a technology plan provides clarity to all stakeholders involved, pinpoints needed resources, constrains goals to reasonable boundaries, and provides for evaluation of project success. Contact the District Consultant because there may be one on file at the District Center for your library.

Components of a Technology Plan

◆ Strategies and Goals – Establish clear goals and a realistic strategy for using telecommunications and information technology to improve library services.

◆ Professional Development – A professional development strategy to ensure that staff knows how to use new and current technologies effectively.

◆ Technology Assessment – An assessment of the telecommunication services, hardware, software and other services that will be needed.

◆ Budget and Financing – Provide a sufficient budget to acquire and support all elements of the plan: hardware, software, professional development and other services that will be implemented.

◆ Evaluation and Measurement – The plan should include ongoing evaluation in order to monitor progress toward the specified goals and make mid-course correction in response to new developments and opportunities.

Facilities

Often new directors have quite a learning curve when it comes to managing and maintaining the library building. From snow removal to plumbing to electrical outages, one needs to know what to do and who to call. Many library boards have a facilities or building and grounds committee and you should meet with them to find out what practices are already established. Ask about a maintenance schedule, which should consist of tasks that are repeated periodically such as replacing HVAC filters, cleaning gutters, cleaning that is not done on a daily or weekly basis. A yearly calendar spelling out what tasks need to be done each month will keep maintenance on track. A spreadsheet of completed tasks with costs and dates could also be helpful in budgeting for facilities maintenance.

It is helpful to have a list of service vendors, people and businesses to call when things go awry. Who to call with a plumbing issue? Who to call if the sewer backs up? Who to call when there's no heat or air conditioning? Who troubleshoots the library's computers? Who is the Internet service provider and what number do you call when the service goes down? Power company? Telephones? Wiring issues? Lighting?

Does the library have an emergency evacuation plan? How will the staff and patrons get out of the building in case of fire? Where will the staff meet? The Occupational Health and Safety Administration's guide to planning for emergencies may be a helpful resource.

When assessing the library's attractiveness and functionality, consider all of the following:

- Lighting outside of the building
- Lighting in the parking area and in and around all entrances and exits
- Emergency lighting which meets local codes
- A way for users to return materials 24 hours a day
- Space for quiet reading and study
- Designated space for meetings, programs, and materials
- Adequate work space for staff
- Attractive and effective interior signage
- Appropriate electronic building security, smoke and fire alarms, and security for collections
- Public address system
- Up-to-date wiring to support the use of new technologies
- Appropriate furnishings for using technology
- A plan for maintaining facilities which includes repainting, carpeting, replacement of furniture, HVAC, equipment, etc.
- A general maintenance schedule and sufficient staff and/or contracted service to ensure safe, inviting, well-maintained facilities and grounds
- An inventory of library furnishings and equipment

As you learn more about your community and how your library is used, it is important to assess how your facility is functioning and what image you are projecting. You may determine that the layout of departments need to change or that the image upon entering the building isn't as inviting as it once was. Take some time to complete the Library Image Checklist to assist with your evaluation.

For more tools and resources, please visit the Facilities section of the District Website.

Technology

The library's website is the digital doorway to all services, resources, and programming. The home page of the library website should be designed to highlight location, hours of operation, and contact information. Additionally, the home page should include prominently placed links to information about services and programs and a monthly calendar of events. Your library's website should constantly be reviewed for accessibility and for current information and non-broken links. Making your website accessible means your online resource is usable by the widest variety of people possible, including those who use screen readers, cannot use a mouse, or who may be on a slow wireless connection. Following basic accessibility guidelines will ensure that your web site is coded accurately for meaning and that it will be rendered well in a variety of formats.   For more information on accessible websites, visit the CT State Library [Libguide on Libraries and Accessibility](#).

Public Access Computers

The library will most likely have a number of computer workstations for use by the public. These workstations can be used to gain access to the library's online catalog, to access online digital databases, and to gain access to the Internet. The public demand for these workstations for accessing the Internet is usually very high, especially during tax time, for vehicle registrations and job applications. The director ensures that library policies are in place to delineate the best use of these workstations by the public.

Pennsylvania Child Internet Protection Act -

(a) Acceptable-use policy.-- The governing body of each public library shall adopt an acceptable-use policy for the Internet. At a minimum, the policy shall contain provisions which are reasonably designed to:

(1) Prevent library patrons, including those patrons under 18 years of age and library employees, from using the library's computer equipment and communications services for sending, receiving, viewing or downloading visual depictions of obscenity, child pornography or material that is harmful to minors.

(2) Establish appropriate measures to be taken against library patrons and employees who willfully violate the policy.

(b) Implementation and enforcement of policy.-- The governing body of the public library shall take such steps as it deems appropriate to implement and enforce the requirements of subsection (a). These steps shall include, but need not be limited to, the following:

(1) the use of software programs designed to block access by library patrons and employees to visual depictions of obscenity, child pornography or material that is harmful to minors; or

(2) the selection of online servers that block access by library patrons and employees to visual depictions of obscenity, child pornography or material that is harmful to minors.

(c) Immunity.--A public library shall not be subject to civil liability for damages to any person as a result of the failure of any approved software program or approved online server to block access to visual depictions of obscenity, child pornography or material that is harmful to minors. Nothing in this section shall be deemed to abrogate or lessen any immunity or other protection

Because of the demand for Internet access, the director may need to establish procedures for scheduling use of computer workstations, such a time management software. The district consultant can recommend products for use in public libraries.

District Technology Services

The District IT Consultant can assist with several different technology related projects, including:

- Network Hardware and Infrastructure
  - Planning and selection
  - Installation and configuration
  - Repair and maintenance
- Desktop and Server Computers
  - Hardware and software planning and selection
  - Installation and configuration
  - Repair and maintenance
- Printer and Network Peripherals
  - Planning and selection
  - Installation and configuration
  - Repair and maintenance
- Special Project Support
  - Server Upgrades and Migration
  - Specialty Software research and assessment
  - Network Cabling
  - Phone System planning and selection
  - Security System planning and selection
  - Vendor Liaison for special projects
  - Warranty Service shipping
  - Training

Advocacy

What is Library Advocacy

Library advocacy is the process of pleading or arguing in favor of the public library. In the 21st century, technological advances have fundamentally changed the way people access information and expenditure of public funds for library services is increasingly being challenged. Library advocates play a critical role in communicating the importance of free and equitable access to information in a democratic society.

Who is an Advocate

Anyone who believes that libraries and librarians are vital in building an information literate nation is at heart an advocate. However, specific groups can be most effective when they speak about the library's impact upon their spheres of influence, for example:

- Library Staff – Frontline Advocacy: At the library and outside of work, library staff has numerous opportunities to engage neighbors, friends, and family in friendly conversations about how the library raises the quality of life in the community.
- Library Trustees: Often have political and community connections that can benefit the library. Also, public officials respect their charge to represent the best interest of the library and their community.
- Library Users: These stakeholders provide invaluable testimony about the difference library programs, collections, and services make in their daily lives.
- Friends of the Library: As an independent community group of library champions, the Friends are often seen as passionate volunteers who tirelessly offer their labor to further the library's mission.
- Community Leaders: Business owners, school principals and teachers, and community service providers can also speak on behalf of the library on the important economic, educational and social contribution to the community's welfare.

Advocacy Planning

The library must have a sustainable advocacy plan that is implemented not only as a reaction in times of crisis. To be most effective, build your advocacy network with several people representing various groups and interests.

Here are some specific things you can do:

- Library Staff: Be enthusiastic and positive. Thank library users for their business. Invite users to share their "library stories." Talk to your neighbor about the library's mission and invite

her to a special library event. Participate in a community meetings and events. Keep elected officials informed about library programs and services. Patronize local businesses.

◆ Library Trustees: Stay informed about library issues regarding funding, censorship, Internet use and filtering. Get to know your elected officials and maintain contact with them throughout the year. Accompany the library director to a presentation before the city council or county commission. Use your connections on behalf of the library.

◆ Library Users: Provide testimony in support of the library at a budget hearing. Sign up to receive library news. Share with friends and family news about the library.

◆ Friends of the Library: Stay informed about library events. Maintain contact with library administrators and trustees. Invite key people (e.g. city council members, business owners, community leaders) to be honorary Friends. Write letters-to-the-editor in support of the library. Thank or recognize local legislators for their support.

◆ Community Leaders: Co-sponsor a library program. Offer to speak in support of the library at municipal meetings and with local and state legislators.

Delivering the Message

To be an effective library advocate you will need three things:

◆ You need to communicate the key message simply and consistently

◆ You need to clearly define your audience by asking yourself "Who can help me achieve the library's goal?"

◆ You need to identify what is the best way to reach your audience, e.g. a personal contact, by phone, by letter, via email, through the library's website, advertising in the media, press release, PSA, letter-to-the-editor, etc.

Examples of Media Outlets:

◆ *Newspapers* remain an effective way to get the word out about programs, description of new and enhanced services, reviews of books, and audio/visual materials.

◆ *Radio* provides an opportunity to broadcast public service announcements.

◆ *Television* is a good chance for special events coverage.

◆ *Advertising flyers* include brochures, bookmarks, and in house publications.

◆ *Websites* highlight location, hours of operation, and contact information. Links to information about services and programs along with a monthly calendar of events should be prominently displayed and constantly updated.

◆ *E-Mail* provides an opportunity to create tailored mailing lists to let individuals know about new materials, programs, services, storytime registration, etc.

◆ *Social networks* such as Facebook, Twitter, Instagram accounts are easy to set up and maintain. They provide an effective way to communicate about programs, services, and community events. They can also be tools for community engagement by patron created

content. Hootsuite, Buffer, and TinyTorch are apps that help you schedule and post across various social media networks.

Dealing with the Media

The library must have a policy in place that deals with media calls and public relations. All library staff, trustees and friends should have a clear understanding of who can speak for the library. The designated spokesperson should have easy access to the library's key messages on various topics. Following are some tips if you are being interviewed:

Be clear about who you represent.

- Know your message – you do not have to reinvent the message for every interview.
- Aim to deliver the key message at least three times.
- Know your audience – find out the type of publication, who the readers or listeners are; ask the reporter what the "angle" is.
- Be prepared to answer the standard "Who- What-Where-When-Why and How" questions.
- Write your key messages and talking points on notecards. Keep them in front of you when doing radio or telephone interviews.
- Talk in "sound bites." Your key message should be short and pithy.
- Don't be afraid to say "I don't know." If you are not sure, say, "I'm sorry I don't know that. I'll be glad to check and get back to you."
- Help the reporter understand by providing fact sheets or background material.
- Practice, practice, practice.
- Remember to smile – remain professional but friendly and likable.
- Stay in control – Keep your answers focused and "on message." Don't let your guard down; this is an interview not a conversation. Nothing is "off the record."

Working with Elected Officials

The most effective library advocates know that it is necessary to cultivate good relations with elected official all year long and not only when the library's budget comes up for a vote. This continuous communication can be done in person, by phone, email or letters, but it is critical to keep local and state officials informed of library successes as much as concerns. Here are some tips when talking with elected officials:

- Start with officials you know support the library.
- Recognize that officials are not experts on everything. Provide fact sheets or background material when needed.
- Stick to one issue. Avoid presenting lists of concerns.
- Do your homework and get to know your elected official. Link the library message to something you know relates to their personal circumstance, interest or experience.
- Get to the elected official's staff. They can become powerful allies to your cause.

- ◆ Don't guess or give misinformation. If you do not know the answer, tell the official you will find out the facts and get back to them as soon as possible.
- ◆ Be personal and share real-world stories from your library.
- ◆ Be direct about what you want and try to get a commitment.

Pennsylvania Library Association

Founded in 1901, the Pennsylvania Library Association (PaLA) is the state's oldest professional library organization serving libraries, library employees, library trustees, and Friends of the Library groups.

PaLA represents more than 1,200 personal, institutional, and commercial members affiliated with public, academic, special, and school libraries throughout the Commonwealth. The association represents the profession in Harrisburg with our state legislature and provides opportunities for professional growth, leadership development, and continuing education for librarians.

- ◆ **Vision -** The Pennsylvania Library Association will be the premier advocate for Pennsylvania libraries.
- ◆ **Mission -** The Pennsylvania Library Association strengthens Pennsylvania's libraries through advocacy, education and leadership. We foster innovation and collaboration, nurture library leaders, and promote the value of libraries.
- ◆ **Strategic Priorities**
  - ▪ Financial sustainability
  - ▪ Membership
  - ▪ Clear communications
  - ▪ Greater awareness and visibility

Visit the Pennsylvania Library Association's website for more information and information on joining the organization.

For more Advocacy Tools and Resources, visit the following pages of the Marketing, Advocacy, and PR section of the District Website:

- ◆ ABCs of Advocacy – Regional Advocacy e-blast
- ◆ Tips and Tools
- ◆ Studies & Research
- ◆ Pa Forward

Access & Services

Nowadays, users of public services expect greater flexibility from providers in terms of when and how they access the services. In some cases, the user demands additional open hours, in others, the ability to receive certain services online 24/7. To remain relevant, the library must position itself solidly in line with the expectations and demands of the community and strive to increase the user's access to its resources.

These efforts may include:

- Listing the library's telephone number in various community directories. The library's contact information and service hours should also be readily available online.
- Opening to the public a regular set of hours that include evening and weekend hours. This schedule must be designed to accommodate the largest possible number of users.
- Promoting interlibrary loan services and initiating reference referrals when materials are not available in the library's own collection to meet patron requests.
- Enhancing the library's online catalog to allow borrowers to access their own account, update personal information, manage their items checked out, and place holds on materials.
- Creating a dynamic website that provides access to the online catalog, contact information for programs and services, links to online resources, such as PA's *POWER Library*, and that capitalizes on emerging technologies and strategies to add value to the library services.
- Providing assistance and equipment for individuals with disabilities and connecting users with LAMP (Library of Accessible Media for Pennsylvanians).
- Serving the broad community through strategic outreach and collaborations to special populations, such as those who speak languages other than English, homebound, early childhood care providers, schools, literacy teachers, health centers, senior citizens, and social service agencies.

As communities change, libraries need to…

- Evaluate how its current mission aligns with the goal of helping the institution and community respond to the challenges of the 21st century;
- Assess where the institution sits today on the continuum of supporting the development of its audiences' 21st-century skills;
- Become increasingly embedded in the community in order to create lasting partnerships that address 21st-century audience needs; and
- Design new programs and strategies to help individuals meet the new and more demanding challenges of 21st-century life.

In directing and providing services to the public, take into account that the library serves all age groups. Services are provided to people throughout their lives, from birth to death. This presents a significant challenge to the library director and staff. How to respond to this challenge depends largely on the size of the library's staff and collection.

Library Service to Children

Offering services to children is an important and substantial part of the services of every public library. Depending on the size of the library, the director may or may not take an active role in providing library service to children and young adults. Often, another staff member will have a primary responsibility for library service to this age group. Although the director may not be the primary provider of service to children, this leader should provide encouragement and see that adequate facilities and resources are made available to those who do.

Within each age group there is a significant developmental span of which the director and the library staff must be aware. Collections and programming need to be appropriate to the child's developmental stage. More and more public libraries are developing services for children in the birth-to-five age group and to the parents and caregivers of these children.

Programming is an essential part of library service to children and the library needs to plan for this. These programs range from "Mommy & Me" and "toddler time" to pre-school story times and regular story hours. If the director or someone on the staff is not able to present children's programs, volunteers from the community may be recruited to assist with programs.

Use of the public library by children is especially high in the summer when school is out. The library will almost certainly provide some type of summer programming in order to encourage children to read and be engaged in learning. The Office of Commonwealth Libraries encourages libraries to participate in the Summer Quest Program and to complete a end of program survey.   the Summer Quest Program. It is important for the person responsible for summer programming to take part in state-offered trainings, neighboring district trainings, or communicate interest for a training to the District Consultant.

Library Service to Young Adults

Large public libraries are more likely to have a special service program for teens; however, even if the library is small it should develop at least some services to respond to the needs of this age group. A designated collection of materials selected to appeal to young adults would be a good start. A library program or programs designed to appeal to young adults is another way of serving this group. A primary reason that many young adults come to the library is to gather information for school assignments. Work with teachers and school librarians to ensure that students don't have false expectations of what kinds of resources are available in your library and make this as positive an experience as possible.

Library Service to Adults

Adults constitute the library users group with the greatest age span and their library service needs vary greatly. A significant number of adults who come to the library are there to find a good book or other library materials for themselves or someone in their family. Library staff can facilitate their search by creating effective displays of adult collections of materials and by providing staff assistance. Readers' Advisory is a key element to interactions with patrons of all ages.

Many adults come to the library to make use of "in house" resources. They may come to reading current magazines and newspapers which cannot be checked out or they may just come for a quiet place to study. Others are there to find information on a particular topic (see "Reference and Information services" below).

Library Service to People with Special Needs

There are people in every community who are reluctant to use the library or who may have difficulty using the library. These people fall into all age groups and have a variety of special needs. Their special need may relate to poverty, level of literacy, aging, mental illness, mobility, a speech or hearing disability, a cognitive disability, or a vision disability. The library should be able to respond to the needs of these individuals for information and library services.

Below are six general strategies that can be used to overcome barriers when working with adults with special needs. These strategies can be adapted to use when working with children and young adults with special needs.

- Include adults with special needs and their families and advocates in planning, implementing, and evaluating public library services.
- Welcome adults with special needs and their families and advocates to the public library in a responsive, sensitive, and appropriate manner.
- Offer a diverse range of resources, services, and programs that are relevant to the lives of adults with special needs and their families and advocates.
- Collaborate with community agencies to provide the best possible services to adults with special needs and their families and advocates.
- Ensure that public library collections, services, and buildings are fully accessible and inviting to adults with special needs and their families and advocates.
- Market public library services, collections, and programs to adults with special needs, their families and advocates, and the community.

For visually/hearing/physically impaired patrons the library can enlist the aid of the LAMP (Library of Accessible Media for Pennsylvanians).

Reference and Information Services

One of the primary functions of a public library is to help library users obtain the information they are seeking to satisfy a personal need. That need may relate to a school assignment, a business or professional problem, a hobby, or just curiosity about a particular topic. Although the library user may be able to find information on their own by consulting the library's resources, they often need additional assistance from the library's staff. Sometimes the library user's information need is simple, but it may be more complex. The training of the director and staff will determine how successfully the complex information needs of library users are satisfied.

Even if a library has a limited onsite collection of reference materials, it has access to enormous reference and information resources through the Internet. These resources include [POWER Library](#). POWER Library is the online portal to all that Pennsylvania libraries offer. This is the place to find trustworthy answers to questions about healthcare, consumer purchases, personal finances, and more. Library patrons can enjoy free 24/7 access to newspapers, magazines, journals, historical documents and photos, online databases, and eBooks. POWER Library can be accessed through the library's web site remotely and in house.

The New Castle Public Library is the district resource center and the professional staff are available to assist you, your staff, and your patrons for more in-depth assistance.