Friends and Foundations (excerpt from the COSLA Public Library Trustee Manual: A Template)

Trustees raise funds for the library by making sure that elected officials know how valuable library service is to the community, and by being an ambassador wherever they go to let the community know how important it is to fund the library. Should they decide to raise donations, it is very important that some mechanism be in place to protect the funds such as a dedicated fund that a new administration / trustee board might not decide to spend some other way. A lawyer should be consulted to ensure this protection which is already in place for grants and gifts restricted by a legal document.

Friends work to raise funds for projects and purchases. Their purpose is not to hold large sums of money to produce interest or to fund a major building project. If the Friends are registered as a 501(c) 3 corporation, gifts to the Friends are tax deductible. Bylaws determine who may be a member and serve as an officer. Bylaws establish how funds will be spent and where funds go should the Friends dissolve.

Foundation boards of directors are generally selected from the group of people in the community who have the most experience in serving on boards and raising money for projects. They often are and / or know many of the people who might make sizable contributions to the foundation. Their purpose is to raise a large sum of money, often for a building project or perhaps an endowment. As with the Friends, contributions are tax deductible with 501(c) 3 status and bylaws determine membership, officers and the dispersal of funds.

FRIENDS OF THE LIBRARY:

Many libraries in the United States have their origins in volunteer groups – from women's clubs to the creation of public facilities from private collections. The desire to help the library may be supported through volunteerism. The use of volunteers should be carefully planned, beginning with determining the purpose of library volunteers. Some questions that may yield answers:

- Does the library have an adequate staff to provide needed services?
- Are there roles volunteers can fill that make a positive contribution to library services?

Volunteers are not a substitute for the core of paid staff that is necessary to provide good library service. Since volunteers are not paid, the expectation should not be for them to work as substitutes for staff or on a regular schedule. They may or may not be available consistently. Maintaining dependable library service is very important if the community's needs are to be met. A volunteer program should have its own goals and objectives, a plan, and a management system.

It is important that staff be fully involved in developing the concept of a volunteer program. Staff should be involved in the planning process to establish roles and to iron out difficulties, and to work toward the success of the volunteer program. If this is done, staff "resistance" to the program, if any, may be eliminated. Staff should discuss what gaps might be filled by volunteers. Some examples of staff work, which might be done by volunteers, are:

- shelving books
- checking out and receiving books

- setting up displays and exhibits
- processing and repairing of materials
- greeting visitors and providing basic information
- contacting patrons to inform them of availability of requested materials
- maintaining depository collections in nursing homes and other sites
- delivering books to homebound people

And, given talents and ability along appropriate lines:
- creating press releases or radio or TV spots, and delivering them to editors and program staff during friendly visits
- planning and executing programs in the library, including story hours and demonstrations
- speaking to community organizations about the library
- developing major events such as art fairs, book sales and special observances
- helping to organize advisory groups to talk with librarians about special collections
- assisting to convey planned messages to groups and individuals about library events or special interests
- training to be a stand-in for staff members who want to attend a workshop
- undertaking special projects for which the staff does not have time, such as oral history, newspaper clipping, developing mailing lists, showing videos, and arranging for discussion groups

Organization of Volunteers

Ideally, a volunteer program in a library should have a staff member in charge. Often, the program is organized and operated by a volunteer, much in the manner of such groups in hospitals, nursing homes and agencies. Assuming a library of modest size, these are the elements of a volunteer program operation:

- a coordinator of volunteers, preferably hired, but probably a volunteer who likes to manage, has good skills in working with people, is reliable, and can give planned time
- an office or location with desk, file, telephone and computer, as well as access to a private interview area
- a list of jobs which volunteers may be invited to do, along with an estimate of the time requirements and the levels of skill required
- an interview process which results in placing volunteers in the most suitable jobs
- a training program for volunteers covering job requirements, techniques and the library's functions and purposes
- a manual of operations setting policies for volunteers and including job descriptions and regulations
- a reward system coupled with evaluation. Rewards may be as simple as hours-earned mentioned in the library bulletin or local press; they should exist to say thanks to the volunteer
- a recruitment system that makes it possible for new people to join the volunteer corps
- a method for dismissing a volunteer who does not perform
- funds and an accounting system to cover out-of-pocket expenses for volunteers who do more than come to the library

Friends of the Library organizations comprise a special group of volunteers, varying in function from library to library. A library board's perception of the Friends group can vary

greatly from community to community. In order to develop a positive relationship between the board and the Friends, each group needs to understand the other's role and mission. The Friends should have bylaws and procedures to guide their activities and to establish their role. Likewise, the library board with a Friends group would do well to define its role through its own policy manual. A memorandum of understanding between the library and friends is useful for defining roles. Sample MOU's may be found on the United for Libraries website: http://www.ala.org/united/friends/orgtools.

The library staff should also understand the Friends' roles and any limits pertaining to Friends' requests of library personnel and resources. Successful Friends groups find that having a liaison to the library board is helpful. Boards of trustees often designate a board member to serve as a liaison to the Friend's Board. The function of a liaison is to know what is going on, what directions are being pursued, and what aid is needed. Frequent communication between the groups is a key ingredient towards developing trust, a positive relationship, and for both organizations to work to improve the library. The majority of Friends organizations are healthy adjuncts to a library. Most concentrate on raising funds through special projects and on serving as library advocates in the community. They are often involved in lobbying for the library and for library legislation. Some members do aspire to trusteeship. Former board members may gravitate to the Friends to continue their interest in and service to the library. Making Friends successful, however, depends on making the group a real organization. The organization may choose to affiliate with a state or national unit. The group should be structured to include these elements in a set of bylaws:
- purpose of the organization
- legal basis (consult an attorney on meeting state and national requirements as a not-for-profit group, including tax status)
- organizational structure: officers, outlining duties and terms, election of officers and board members, committee structure, meetings schedule and normal agenda, designation of the annual meeting, handling of funds, relationship to the library and the library board
- disposition of funds
- membership requirements and dues

Boards should accept the limitations Friends set for their group. Some groups will put on one fundraiser a year; others are active in seeking donations year-round. The most successful groups plan ahead and guarantee to do certain tasks during the year. Some groups mix volunteerism with fundraising activities as a way to support the library. Friends supplement the work of the board as well as provide a link to the community. Boards can contribute to harmonious relations by recognizing the Friends, asking for help in planning mutually beneficial activities and giving support to the concept of a community group willing to work to benefit the library.

FOUNDATIONS:

Any size library may create a Public Library Foundation, even though the common perception is that they are only for "big" libraries. A foundation is different from the traditional Friends of the Library efforts by involving non-library users, as well as, library patrons to increase awareness of library services and resources throughout the entire community. The non-profit status of a foundation provides a platform for raising money and support for current library services as well as securing a financial future for the library.

There is virtually no difference in the legal structure of Foundations and Friends groups.

Both are established as 501(c) (3) non-profits. Check the laws in your own state for nonprofit status requirements. There are two main reasons for a Foundation:

- Advocacy: The foundation will become some of the library's strongest advocates, and can form new partnerships with schools, businesses, organizations, and agencies to offer new programs and services in addition to expanding local resources
- Financial support: Local funding for a public library may vary when local governmental officials commit much of the local tax base to "essential services" infrastructure, such as fire and police. The public library may then be relegated to using state and local funds for "basic operations" with little money allotted for special materials and services to carry out its goals and objectives

Much of the money raised by the library foundation will be local money which is tax deductible due to the public library foundation's 501(c)(3) tax status. The 501(c)(3) status also opens up grant opportunities for the public library foundation to help collect money outside of the local area to benefit the library services and the community it serves.

Friends or Foundation

A public library foundation is a non-profit organization with a 501(c)(3) status recognized by the Internal Revenue Service (IRS). Since most grant funding agencies are also classified as foundations, the administration of the founding agency knows that the nonprofit organization requesting a grant is regulated by the same IRS guidelines as the granting agency follows. Therefore, it is easier to apply for and accept grant funding, bequests, and corporate donations.

Friends of the Library organizations may have been around a long time and have proven to be a major support to libraries, however, individuals looking to make large bequests, corporate donors, and grant funding agencies may not recognize the role of a Friends group. Therefore, the opportunity to bring in funding from outside of the local community may be limited when requested through a Friends group.

Both public library foundations and Frie.nds of the Library organizations should apply for 501(c)(3) status. This means that:
- the organization has been recognized by the IRS and meets the criteria of a 501(c)(3) non-profit organization
- annual reports are filed with the IRS declaring money received is within the mission and objectives of the non-profit organization.
- the non-profit organization is maintaining its status as a 501(c)(3) by keeping donations and the outside financial assistance within the IRS guidelines.