

Resource Guide—California Public Library Trustees Toolkit

Note: The resources listed here are not intended as legal advice. Public library trustees should always consult their legal counsel regarding legal questions.

Organizations that support public libraries/trustees

- [California Library Association](#) (ALA)
- [California State Library](#) (CSL)
- [California cooperative library systems](#) (nine systems statewide)
- [Council of California County Law Librarians](#) (CCCLL)
- [California Public Library Advocates](#) (CPLA)
- [American Library Association \(ALA\)](#)
- [United for Libraries](#) (ALA division for trustees and library friends/foundations)
- [Public Library Association](#) (PLA) (ALA division)
- [Council of State Library Agencies](#) (COSLA)
- [Institute of Museum and Library Services](#) (IMLS) (independent federal agency)
- [Association for Rural and Small Libraries](#) (ARSL)
- [Urban Libraries Council](#) (ULC)
- [American Indian Library Association](#) (AILA)
- [REFORMA](#) (promoting library services to the Spanish-speaking)
- [Black Caucus of the American Library Association](#) (BCALA)
- [Asian/Pacific American Librarians Association](#) (APALA)
- [BoardSource](#)
- [National Council of Nonprofits](#) (trusted resource and proven advocate for America's nonprofits)

About public libraries & trusteeship

- [Value of California's Public Libraries](#) (California State Library, comprehensive work)
- [Libraries Matter: Impact Research](#) (American Library Association)
- [Expect More](#) (treatise by R. David Lankes, library scholar, educator and thought leader)
- [Leadership Roles for Library Trustees](#) (Urban Libraries Council)
- [ALA Center for the Future of Libraries trends page](#)
- Other recent studies/articles on the role of the public library:
 - [“How Public Libraries Help Build Healthy Communities”](#) (Brookings Institution)
 - [“Library As Infrastructure”](#) (*in Places*, 2014)
 - [“Library Services in the Digital Age”](#) (study by Pew Research)
 - [“The complicated role of the modern public library”](#), in *Humanities* (National Endowment for the Humanities)
- [History of US public libraries](#) (Digital Public Library of America--online exhibition)
- [Keys to the Whole World: American Public Libraries](#) (National Public Radio--short, interesting broadcasts on public libraries in the United States, recorded in 2013)
- [The e's of libraries](#) (American Library Association; covers what today's libraries do for the nation's communities--education, employment, entrepreneurship, etc.)

- [Board service readiness quiz](#) (BoardSource)

California public library laws

- [California Legislative Information \(Leginfo\)—California Constitution and Codes](#)
- [California Library Laws \(California State Library\)](#)
- [Types of public libraries in California and the state laws under which they are formed](#)
- [Municode California](#)
- [Local Codes and Charters \(U.C. Berkeley Institute of Governmental Studies Library\)](#)
- [California Resources—Local Governments \(Georgetown University Law Library\)](#)
- [Serving the public interest: a legislative history of the county service area law](#) (California Senate)
- [About California special districts](#) (California Special Districts Association)
- [Joint Exercise of Powers agreement](#) (JPA) (Sacramento Public Library)

Roles & relationships (trustees, library director, friends/foundations)

- [Working Together: Roles and Responsibilities Guidelines](#) (United for Libraries)
- [The role of library trustees](#) (United for Libraries)
- [Board roles and responsibilities](#) (National Council of Nonprofits)
- [Roles of board and library director](#) (COSLA Trustee Manual excerpt)
- [Boardsmanship, or who does what?](#) (Idaho Commission for Libraries)
- [Director and Trustee Responsibilities and What They Need to Know](#) (New Jersey State Library)
- [Board and Director Roles and Responsibilities](#) (Washington State Library)
- [Working Together: Roles and Responsibilities Guidelines](#) (United for Libraries)
- [Roles of Board and Library Director](#) (COSLA Trustee Manual excerpt)
- [The Role of the Board and the Library Director](#) (State Library of Iowa)
- [Director and Trustee Responsibilities and What They Need to Know](#) (New Jersey State Library)
- [Strategic Planning: Roles of the Director & Board](#) (North Dakota State Library)
- [Board and Director Roles and Responsibilities](#) (Washington State Library)
- [Trustee "golden guidelines"](#) for working with the library director and staff (adapted from the Washington public library trustee wiki)
- [12 golden rules for board members](#) (United for Libraries)
- [Working effectively with friends](#) (United for Libraries Short Takes for Trustees)
- [Friends and libraries: working effectively together](#) (United for Libraries)
- [Sample board policy for library friends](#) (Fauquier Public Library)
- [The role of the friends board](#) (Friends of Libraries USA)
- [Friends and foundations](#) (excerpt from the COSLA Public Library Trustees Manual: A Template)

Bylaws & new trustee recruitment

Sample board bylaws and templates from California libraries and others:

- [Butte County Library Advisory Board](#)
- [Butte County Public Law Library](#)
- [Contra Costa County Public Law Library](#)
- [Escondido Public Library](#)
- [Glendora Public Library](#)
- [Napa County Library Commission](#)
- [National City Public Library](#)
- [OC Public Libraries](#)
- [Palm Springs Public Library](#)
- [Paso Robles Public Library](#)
- [Sonoma County Library Commission](#)
- [South Pasadena Public Library](#)
- [Woodland Public Library](#)
- [Bylaws template](#) (Indiana)

New trustee recruitment:

- [Trustees: recruiting new board members](#) (Massachusetts Libraries)
- [Building a better board of trustees](#) (American Libraries magazine, Oct. 15, 2015)
- [Board basics](#) (New Jersey Library Trustee Association)
- [Effective board recruitment for trustees and friends](#) (Wyoming State Library)
- [Board organization](#) (Washington State Library)
- [Leadership Roles for Library Trustees](#) (Urban Libraries Council)
- [Board Recruitment](#) (BoardSource)
- [Developing a Board Recruitment Process](#) (WildApricot)
- [Finding the right board members for your nonprofit](#) (Council of Nonprofits)
- [Sample board profile worksheet](#) to identify gaps and desired board characteristics (Kentucky)
- [Public library trustee position description](#) (Lodi Public Library)
- [Library trustee duties](#) (Burlingame Public Library)
- [Board member position description](#) (Benicia Public Library)
- [Sample trustee job description](#) (Maine Library Trustee Handbook)
- [Finding new board members](#) (Utah Library Trustee Center)

Effective meetings

- [Effective meetings](#) for library trustees (United for Libraries)
- [Sample California library agenda](#)
- [Effective library board meetings](#) (COSLA)
- [Sample agenda](#) (Georgia Public Libraries)
- Parliamentary procedure resources:
 - [Basics of parliamentary procedure](#) (United for Libraries)
 - [Parliamentary procedure](#) (good general overview by Britannica)
 - [Parliamentary basics](#) (National Association of Parliamentarians)
 - [Parliamentary procedure at a glance](#) (ALA)
 - [Robert's Rules of Order online](#)
 - [Robert's Rules for dummies cheat sheet](#) (dummies.com)
 - [Robert's Rules of Order official website](#) (full information and summary charts)
 - [Rosenberg's Rules of Order](#) (simplified parliamentary rules by Judge Dave Rosenberg [Yolo County, CA])
 - [Rosenberg's Rules of Order at a glance](#) (South Robertson Neighborhoods Council, City of Los Angeles)

California sunshine & ethics laws

- [California meetings laws \(Digital Media Law Project\)](#)
- The [Ralph M. Brown Act](#) and an [analysis of its main provisions](#) (Best Best and Krieger law firm)
- [The People's Business: A Guide to the California Public Records Act](#) (League of California Cities)
- [Understanding the Basics of Public Service Ethics Laws](#) (California Association of Counties)
- [AB 1234 Local Ethics Training](#) (California Fair Political Practices Commission--free)
- [Statement of Economic Interests Form and Instructions](#) (CA Fair Political Practices Commission)
- [Understanding public service ethics laws](#) (Institute for Local Government, UC Berkeley)
- [Ethics laws for public servants: key things to know](#) (California Association of Counties)
- [Developing a conflict of interest policy](#) (National Council of Nonprofits)
- [Brown Act closed session checklist](#) (aid to agenda language for closed session items allowed by the Brown Act—for reference [not intended as legal advice])

The Brown Act in the COVID era:

- [Virtually challenged: public meetings in the age of COVID](#) (Council of California County Law Librarians)
- [Sample resolution](#) (AB 361 compliance—teleconferencing)

Federal laws of particular relevance to public libraries

- [Americans with Disabilities Act](#) and the ADA best practices toolkit for state and local governments
- [Children's Internet Protection Act \(CIPA\)](#) and ALA's [CIPA guide for libraries](#)
- [US Copyright Law](#) (Title 17), Stanford's [Copyright and Fair Use](#) page, and [ALA's copyright page](#)
- [Equal opportunity and affirmative action laws](#), including:
 - [Title VII of the Civil Rights Act of 1964 \(Title VII\)](#) [protects against discrimination based on race, color, religion, national origin, sex, pregnancy, etc.]
 - [The Equal Pay Act of 1963 \(EPA\)](#) [equal pay for men and women]
 - [The Age Discrimination in Employment Act of 1967 \(ADEA\)](#) [protects people over 40 from age discrimination]
 - [Title I of the Americans with Disabilities Act of 1990 \(ADA\)](#) [protects qualified people with a disability from discrimination in the private sector and in state and local governments]
 - [Sections 102 and 103 of the Civil Rights Act of 1991](#) [permits jury trials for intentional discrimination]
 - [The Genetic Information Nondiscrimination Act of 2008 \(GINA\)](#) [prohibits employment discrimination based on genetic information]
- [Fair Labor Standards Act \(FLSA\)](#) and [associated tools for employers](#) from the Wage and Hour Division
- [USA Freedom Act](#) [replacement for part of the controversial [Patriot Act](#), most of the provisions of which have now expired]

Related resources:

- [Guide to the Children's Internet Protection Act \(CIPA\)](#) (Federal Communications Commission)
- [No-cost outreach and education programs](#) (U.S. Equal Employment Opportunity Commission)

Library board liability

- [California public entity liability law](#)
- [Claims against the government](#) (Sacramento Public Law Library; though intended for claimants, provides a nice summary of public entity liabilities in California)
- [What it means to be a trustee](#) (United for Libraries)
- [Board liability](#) (excerpt from COSLA Public Library Trustees Manual)
- [Liability and the board: what governing teams need to know](#) (Nonprofit Risk Management Center)

Library values & trustee ethics

- [Library Bill of Rights](#) (American Library Association [ALA])
- [Library Bill of Rights Interpretations](#) (ALA)
- [Equity, Diversity and Inclusion](#) (ALA)
- [Public Library Trustee Ethics Statement](#) (official statement from United for Libraries)

Community analysis & strategic planning

Community analysis:

- [California Harwood resources](#) (California State Library)
- [The Community Centered Library](#) (Colorado State Library)
- [American Community Survey Data Tables and Tools](#) (US Census)
- [Action Guide for Re-envisioning Your Public Library](#) (Aspen Institute)
- [Niche Academy for Gale Analytics Users archived training](#) (CALL Project, California Library Association)
- [Data for Decision Making](#) archived webinar (Infopeople)
- [World Café](#) (method for community engagement in library planning (ALA))
- [Data-Driven Librarianship](#) [tools for library and community analysis] (Public Library Association)
- [Sample surveys](#) (COSLA) [a list of library surveys, survey tools, and survey data]

Strategic planning:

- [A Library Board's Practical Guide to Strategic Planning](#) (United for Libraries)
- [Planning and evaluation resources](#) (Public Library Association)
- [Strategic Planning and Project Management](#) video (COSLA Library Directors 101 Series)
- [Library Consultants Directory Online](#)
- [California Cooperative Library Systems](#)
- [About mission statements](#)
- [Library evaluation primer](#) (Montana State Library)
- [Strategic planning resources and sample library strategic plans](#) (Vermont State Library)
- [Strategic Planning: Roles of the Director & Board](#) (North Dakota State Library)
- Strategic plan examples from California libraries:

- o [County of San Luis Obispo Public Libraries](#)
- o [Fresno County Public Library](#)
- o [LA County Library](#)
- o [Orange County Library System](#)
- o [Paso Robles City Library](#)
- o [San Francisco Public Library](#)
- o [Santa Monica Public Library](#)
- o [Stanislaus County Library](#)

Hiring & evaluating the library director

Hiring the library director:

- [Hiring the Library Director](#) (COSLA Trustee Toolkit)
- [Finding a Library Director](#) (United for Libraries practical guide for trustees)
- [Hiring a Library Director](#) (Maine State Library Trustee Information Center)
- [Library Director Qualifications](#) (ALA)
- [Hiring a Library Director](#) (Washington State Trustees Wiki [scroll down for library director content–lots of good references to federal laws, though references to Washington State law do not apply])
- [Hiring and Evaluating the Library Director](#) (New Jersey State Library trustees site)
- [Guide to Finding the Right Library Director](#) (Wyoming State Library trustees site)
- [Pitfalls to Avoid](#) (from Finding a Library Director, United for Libraries)

Evaluating the library director:

- [Evaluating the Library Director](#) (United for Libraries Short Takes for Trustees)
- [Organizational Tools for Trustees](#) (United for Libraries–offers four sample evaluation forms)
- [Personnel Performance Evaluation Policies and Forms](#) (MRSC Washington State–developed for Washington State local governments but offers many useful templates that can be adapted)
- [Sample Director Evaluation Form](#) (Georgia trustees site)
- [Sample Director Evaluation Forms](#) (New Hampshire State Library trustees site)
- [Evaluating the Library Director](#) (Google slide presentation by Jamie LaRue)
- [Evaluating a Library Director](#) (Maine State Library Trustee Information Center)
- [Mid-Hudson Library Director Evaluation Part I](#) (United for Libraries)
- [Mid-Hudson Library Director Evaluation Part II](#) (United for Libraries)

Library policy making

Note: Policies from other states may need adaptation to conform to California state/local laws and guidance

- [Sample library policies](#) (United for Libraries)

- [Sample library policies](#) (ALA)
- [Policy examples](#) (Public Library Association)
- [Policies](#) (Mid-Hudson Library System–helpful guide to library policy development and review)
- Policy examples from California public libraries:
 - [Berkeley Public Library](#)
 - [Butte County Library](#)
 - [Daly City Public Library](#)
 - [Merced County Library](#)
 - [Pasadena Public Library](#)
 - [Sacramento Public Library](#)
 - [San Diego Public Library](#)
- [Comprehensive sample policies for public libraries](#) (Connecticut State Library)
- [Library policy development](#) (Idaho Commission for Libraries)
- [Policies and Procedures](#) (section on policy development from the Alabama State Library trustees guide)
- [Recommended library policies](#) (Kansas State Library)
- [Checklist for reviewing library policies](#) (Kansas State Library)
- [Developing library policies](#) (Maine State Library)
- [Public library policies](#) (Washington State)
- [Checklist for writing library policies](#) (Central Kansas Library System)

Dealing with common policy issues:

- [Understanding strident claims about electronic resources](#) (Colorado Library Consortium)
- [Weeded, unwanted and discarded books](#) (Friends of Colorado Libraries)
- [Intellectual freedom policy guidelines](#) (ALA)
- [Protecting patron privacy: library policy development](#) (YouTube video from the Colorado State Library)
- [How to respond to challenges and concerns about library resources](#) (ALA)
- [Censorship challenge tools](#) (ALA)
- [Dealing with challenges to materials and policies](#) (Wisconsin Trustee Essential #23)
- [Policies](#) (set of learning resources on important library policies from WebJunction)
- [Rules of conduct](#) example (Los Angeles Public Library)

Budgeting & finances

State and local support:

- [California Public Library Organization](#) (California State Library: overview of operational and capital funding by library type)
- [Financial support programs for California public libraries](#) (California State Library)
- [California Grants Portal](#) (California State Library: searchable database for competitive grant opportunities offered by California state agencies)
- [Library Innovation Lab grants](#) (California Humanities)

- [California Grant Watch: grants for literacy and libraries](#) (includes federal, state, and private grants; requires registration and payment)

Federal and private support:

- [Institute of Museum and Library Services](#) grant programs (direct federal funding for libraries and museums)
- [National Endowment for the Humanities](#) grants
- [SAM.gov assistance listings](#) (formerly the Catalog of Federal Domestic Assistance)
- [Grants.gov](#) (comprehensive federal grants database)
- [Foundation Directory Online](#) (Candid [formerly the Foundation Center]; fee-based but gives 24 hours of free online access)
- [Library grants blog](#) (by consultant Stephanie Gerding; information about national grant sources)
- [Penguin/Random House grants for small & rural libraries](#) (ARSL--rolling applications through 2022)
- Webinars and organizations for grant project development and writing:
 - [Introduction to Finding Grants](#) (Candid)
 - [Introduction to Proposal Writing](#) (Candid)
 - [Winning Library Grants](#) (Infopeople webinar by Stephanie Gerding; free)
 - [Ten Tips for Library Grants](#) (Infopeople post by Stephanie Gerding)
 - [Web Junction webinars and courses](#) (OCLC: free, requires registration)
 - [Candid](#) (formerly Foundation Center)
 - [Grantsmanship Center](#) (great source for information and training on grants)

Budgeting and budget monitoring:

- [Library budget 101](#) (YouTube video by Robert Karatsu, Developing Leaders in California Libraries)
- [Making a budget presentation](#) (Public Library Association)
- [Budgeting for library boards](#) (Indiana State Library trustee training YouTube video)
- [Values-aligned budgeting](#) (presentation by John Chrastka, Executive Director, EveryLibrary)
- [Developing the library budget](#) (OCLC WebJunction article by the Wisconsin Department of Public Instruction; part of the Wisconsin Trustee Essentials handbook)
- [Developing the library budget](#) (Maine Library Trustee Handbook)
- [Managing the library's budget](#) (Wisconsin's Trustee Essentials Handbook #9)
- [Public library financial management guide](#) (Library of Michigan--useful content though geared toward Michigan library law)
- [Library operations resources](#) (California State Library)
- [Organization financial assessment](#) (Alaska State Library, Museums and Archives)
- [Sample budget memo](#) (Georgia Libraries)
- [Sample budget](#) (Georgia Libraries)

Board engagement with the budget process:

- [California scenarios: the library board and the budget process](#) (Trustee Toolkit excerpt)

- [From Awareness to Funding: A Study of Library Support in America](#) (OCLC, ALA, and PLA: shows that while most voters believe libraries are supported with federal and state funding, in actuality 86 percent comes from local funds)
- [Advocacy within](#) (California Library Association–CALL Academy webinar by Dustin Fife (free; requires registration; focuses on building relationships with decision makers to create library supporters at every level
- [Beyond storytelling to engage leaders and enact change](#) (CALL Academy webinar by Patrick Sweeney, EveryLibrary; free [requires registration])
- [Navigating a challenging budget year](#) (ALA)
- [Engagement tools](#) (California Library Association)

Continuing education for the library board

New member orientation:

- [Trustee orientation checklist](#) (Trustee Toolkit)
- [Welcoming new library trustees](#) (Illinois Library Association)
- [Sample board orientation guide](#) (North Dakota State Library)
- [Trustee Trouble: video on board orientation](#) (Wyoming State Library)
- [Welcoming new public library trustees: orientation tips and resources](#) (Colorado State Library)
- [Sample policy for board orientation](#) (Lied Public Library, Iowa)

Board self-evaluation:

- [A library board's practical guide to self-evaluation](#) (United for Libraries)
- [Library board effectiveness](#) (evaluation procedure and template)
- [Evaluating the state of the library: board effectiveness](#) (Mid-Hudson Library System)
- [Evaluating the board](#) (Jamie LaRue)
- [Board self-evaluation questionnaire](#)–Dalhousie University (Wyoming State Library)
- [Board evaluation template](#) (individual and board as a whole) (Utah State Library)
- [Trustee self-assessment](#) (example assessment for individual trustees (Kentucky)

Learning resources:

- Sources for training resources for public libraries and trustees (California)
 - [CALL](#) (California Libraries Learn–California Library Association)
 - [Infopeople](#) (Califa Group)
 - [California Public Library Advocates](#) (free 3-hour workshop available on request for members)
 - [Serving with a Purpose](#) (annual California conference for library trustees, friends and supporters)
- Sources for training resources for public libraries and trustees (national)
 - [WebJunction Friends, Trustees and Volunteers](#) section (OCLC)
 - [United for Libraries resources](#) (Excel spreadsheet of United for Libraries resources for trustees; central place to find everything they have and whether it's free or fee based, or for members only)
 - [United for Libraries training resources](#) (American Library Association)

- o [WSL training calendar](#) (a multi-state calendar for free online library trainings from various sources, compiled and updated by the Wyoming State Library)
- o [Online learning opportunities](#) (listing of free and fee based online learning for libraries, compiled and updated by the New Mexico State Library)
- o [Recommended free training resources](#) (Idaho Commission for Libraries)
- o [Library director 101 video series](#) (COSLA—short videos (10–15 minutes) with content of interest to both library directors and trustees)
- o [Administration and leadership resources](#) (Public Library Association [division of ALA])
- o [On-demand webinars \(administration and leadership\)](#) (PLA – low cost webinars on topics of interest to library directors and trustees)
- o [Amigos Library Services](#) (training free for Amigos members, low cost for others)
- o [Trustee training resources](#) (Central Kansas Library System)
- o [Library trustees resources](#) (South Central Library System, Wisconsin)
- o [Board development](#) (New York State)
- Sources for videos and online courses (note: videos developed by other states may include some content related to their own state laws and practices that do not apply for California):
 - o [Trustee Academy](#) (United for Libraries; comprehensive training; fee-based)
 - o [Short Takes for Trustees](#) (United for Libraries; a series of 10-minute videos that can be shown during board meetings to stimulate discussion about the board’s role in library governance)
 - o [Trustee Trouble](#) (series of short videos on various topics related to library trusteeship)
 - o [Getting on board](#) (YouTube video trustee learning series by the State Library of Pennsylvania)
 - o [Trustee training videos](#) (Central Kansas Library System—mostly short videos to use during board meetings, from various sources)
 - o [Library trustee webinars](#) (HATS – New York State Library; short videos [10–15 minutes])
 - o [Trustee training](#) (RAILS: Reaching Across Illinois Library System—longer, more in-depth webinars on topics of interest to trustees))
- Building a culture of learning
 - o [Sample board continuing education policy](#) (Royal Oak Public Library, Michigan)
 - o [Building a culture of learning with library boards](#) (WebJunction webinar and resources)
- Trustee manuals from other states
 - o [Indiana](#)
 - o [Maine](#)
 - o [New York](#)
 - o [Oklahoma](#)
 - o [Texas](#)
 - o [Utah](#)
 - o Virginia: [Handbook for governing boards](#) [Handbook for advisory boards](#)
 - o [Wisconsin](#)
- Trustee manual examples (California public libraries)
 - o [Altadena Library District](#)

- o [Council of California County Law Librarians](#)
- o [South Pasadena Public Library](#)
- o [Stanislaus County Library](#)