

## 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)
- [ALA Center for the Future of Libraries trends page](#)
- [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](#)
- [About California special districts](#) (California Special Districts Association)

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

- [Working Together: Roles and Responsibilities Guidelines](#) (United for Libraries)
- [Challenges to Materials and Programs: The Role of Library Trustees & Board Members](#) (United for Libraries)
- [Organizational Tools for Friends Groups](#) (United for Libraries)
- [Understand how the board's role and the library director's role differ](#) (COSLA)
- [The role of the friends board](#) (Friends of Libraries USA)

## Bylaws & new trustee recruitment

Sample board bylaws and templates from California libraries and others:

- [Butte County Library Advisory Board](#)
- [Contra Costa County Public Law Library](#)
- [Escondido Public Library](#)
- [Palm Springs Public Library](#)
- [Sonoma County Library](#)
- [Indiana State Library Bylaws template](#)

New trustee recruitment:

- [Leadership Roles for Library Trustees](#) (Urban Libraries Council)
- [Board Recruitment](#) (BoardSource)
- [Public library trustee position description](#) (Lodi Public Library)
- [Board member position description](#) (Benicia Public Library)

## Effective meetings

- [Sample California library agenda](#)
- [Effective library board meetings](#) (COSLA)
- Parliamentary procedure resources:
  - [Basics of parliamentary procedure](#) (United for Libraries)
  - [Robert's Rules of Order online](#)

## California sunshine & ethics laws

- [California meetings laws](#) (Digital Media Law Project)
- [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])

### **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 \(CIPA\)](#); ALA's [CIPA guide for libraries](#); [Guide to the Children's Internet Protection Act \(CIPA\)](#) (Federal Communications Commission)
- [US Copyright Law](#) (Title 17), Stanford's [Copyright and Fair Use page](#), and ALA's [copyright page](#).
- [Equal opportunity and affirmative action laws](#),
- [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]

### **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)
- [Board liability](#) (excerpt from COSLA Public Library Trustees Manual)

### **Library values & trustee ethics**

- [Library Bill of Rights](#) (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)

Strategic planning:

- [Planning and evaluation resources](#) (Public Library Association)
- [Strategic Planning and Project Management video](#) (COSLA Library Directors 101 Series)
- Strategic plan examples from California libraries:

- o [LA County Library](#)
- o [Paso Robles City Library](#)
- o [San Francisco 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)
- [Pitfalls to Avoid](#) (from Finding a Library Director, United for Libraries)

Evaluating the library director:

- [Organizational Tools for Trustees](#) (United for Libraries—offers four sample evaluation forms)
- [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)
- [Policy examples](#) (Public Library Association)
- Policy examples from California public libraries:
  - o [Berkeley Public Library](#)
  - o [Pasadena Public Library](#)
  - o [Sacramento Public Library](#)

Dealing with common policy issues:

- [Selection & Reconsideration Policy Toolkit for Public, School, & Academic Libraries](#) (ALA)
- [How to respond to challenges and concerns about library resources](#) (ALA)
- [Censorship challenge tools](#) (ALA)
- [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)

Budgeting and budget monitoring:

- [Library budget 101](#) (California Library Association–CALL Academy webinar by Robert Karatsu, Developing Leaders in California Libraries; requires free registration)
- [Making budget presentations](#) (ALA)
- [Budgeting for library boards](#) (Indiana State Library trustee training YouTube video)
- [Values-aligned budgeting](#) (presentation by John Chrastka, Executive Director, EveryLibrary)
- [Library operations resources](#) (California State Library)

Board engagement with the budget process:

- [California scenarios: the library board and the budget process](#)
- [Beyond storytelling to engage leaders and enact change](#) (CALL Academy webinar by Patrick Sweeney, EveryLibrary; requires free registration)
- [Navigating a challenging budget year](#) (ALA)
- [Advocacy tools](#) (California Library Association)

## **Continuing education for the library board**

New member orientation:

- [Trustee orientation checklist](#) (Trustee Toolkit)

Learning resources:

- Sources for training resources for public libraries and trustees (California)
  - [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)

- [California Libraries Learn \(CALL\) Academy](#) (self-paced learning available to Trustees with a free account)
- Sources for training resources for public libraries and trustees (national)
  - [WebJunction Friends, Trustees and Volunteers section](#) (OCLC)
  - [United for Libraries training resources](#) (American Library Association)
  - [Administration and leadership resources](#) (Public Library Association [division of ALA])
  - [On-demand webinars \(administration and leadership\)](#) (PLA – low cost webinars on topics of interest to library directors and trustees)

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):

- [Trustee Academy](#) (United for Libraries; comprehensive training; fee-based)
- [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)
- [Trustee Trouble](#) (series of short videos on various topics related to library trusteeship)
- [Trustee training](#) (RAILS: Reaching Across Illinois Library System--longer, more in-depth webinars on topics of interest to trustees)
- Trustee manual examples (California public libraries)
  - [Altadena Library District](#)
  - [Council of California County Law Librarians](#)