SOUTH DAKOTA PUBLIC LIBRARY TRUSTEE HANDBOOK

South Dakota Public Library Trustee Handbook

2024 Edition

Updated 2026

Published by:

South Dakota State Library
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Pierre, SD 57501
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library.sd.gov

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Welcome!



There are three fundamental components that work together to make a public library successful—an excellent director, a supportive community, and an educated, active library board. Without even one of these pieces the sustained success of the library is in jeopardy.

Part of the mission of the South Dakota State Library is to, "…[provide] services and resources towards advancing and improving the institutional capacity of the State's library community…." This comes straight from the South Dakota State Library LSTA Five-Year Plan, 2023-2027.
This Trustee Handbook was developed to support the education of library board members so that every community can have a successful library.

As you use this handbook, please keep in mind that as a library board member you are a trustee of the library. The first five letters of the title say it all. TRUST. You are entrusted with a cornerstone of our democracy in the library. Why? A democracy depends on an informed and educated populace to function, and that does not come from social media or other untrustworthy sources but from the library.

As trustees, you are entrusted with public funds which need to be used to support a library your community needs. You are entrusted with the operation of the library through policy and the appointment of an excellent director. You are entrusted with the future of the library through planning and thought. You are entrusted with an institution that is near and dear to the hearts of most individuals.

Being a library trustee can be difficult, but it will also be one of the most rewarding ways that you can serve your community. I thank you for your service and your willingness to learn and grow with the library. Please remember that we at the State Library are always here to help.

George Seamon

South Dakota State Librarian

Preface

The South Dakota State Library is a Division of the South Dakota Department of Education. There are three divisions within the State Library:

Accessible Library Services
Provides access to information to patrons who are unable to access standard print due to a visual, physical, or learning disability.

Access Services
Connects library users to library resources through statewide resource sharing, interlibrary loan, and making digitized resources available.

Outreach Services
Connects libraries with collections, services, consultations and resources to strengthen library service throughout the state, encourages lifelong learning for SD citizens through library resources, and assists individual libraries to enhance library service in their communities.

The purpose of the SD Public Library Trustee Handbook is to provide library trustees with a basic understanding of laws, rules, and best practices of running a library. In addition, it will give trustees a basic understanding of their roles and responsibilities as a library board member.

A Snapshot of Public Library Services in South Dakota

South Dakota has 106 federally recognized public libraries. 89% of South Dakotans are served by a local public library. These libraries serve populations from 200 to 250,000:

- 59 libraries serve populations under 2,000
- 30 libraries serve populations 2,000 to 10,000
- 17 libraries serve populations over 10,000

South Dakota public libraries serve under a variety of administrative bodies:

- 73 city libraries
- 13 county libraries
- 15 school-public combo libraries
- 5 tribal college libraries that also serve the public

See the SD Public Libraries Facts and Stats publication for more statistical facts.

The SD State Library created this handbook as an educational resource for use by South Dakota public libraries and boards. It should not be used as a substitute for legal advice. This manual draws on trustee handbooks from other states and the committee also employed AI tools for editorial planning. Thanks to the following state library agencies for use of their trustee handbooks, which were reviewed for general information: Iowa State Library, ND State Library, Library of Michigan, Kansas Regional Library Systems.

Chapter 1: Roles and Relationships: Board, Director, and Governing Body

A successful library relies on the collaborative efforts of the library board, the director, and the library's governing body. Effective communication, respect, and sharing a common focus on community needs are key elements of this partnership.

Role of the Board

South Dakota's more than 100 public libraries are guided by library boards, also known as boards of trustees. Library boards in South Dakota operate as governing boards when it comes to the duties and powers in SD Codified Law 14-2-40 Duties of Trustees and SD Codified Law 14-2-41 Powers of Trustees. However, there are some areas where the governing authority (city or county) has jurisdiction and the library board's role is limited. For example, employee pay and personnel policy.

Library Board/Trustees

- Hire a competent and qualified librarian. Includes recruiting, hiring, and annually evaluating the director based upon a well-defined job description and expectations.
- Determine and adopt policies to govern the operation of the library.
- Help determine the direction of the library by studying community needs, conducting community surveys, and ensuring that the library has a 3–5-year strategic plan with goals.
- Assist the library director with budget planning and presentation of the budget to the governing body.
- Are familiar with city/county ordinances affecting the library, as well as state or federal laws. SD Codified Law Duties of Trustees
- Participate in continuing education activities to help the library achieve voluntary accreditation through the state library.

Public Relations Role of Library Trustees

Trustees serve as the public's representatives to the library and as the library's representative to the public it serves. The list below defines the public relations role of trustees:

- Know what your library has to offer; be a library user.
- Supports the librarian’s efforts to maintain an effective public relations program by promoting library services and needs throughout the community.
- Studies and actively supports legislation to improve library services on local, state and national levels.
- Establishes a good working relationship and maintains year-round cordial contact with the city or county commissioners, community leaders, and other government officials.
- Participates, when asked, in formal public relations activities.

Both the board and the governing body (city or county) should support the director in performing her/his administrative responsibilities. The board should ensure the director's continued education and development by encouraging participation in professional associations and by requiring attendance at

workshops and conferences. The board itself should also take responsibility for its own continuing education.

Role of the Director

The librarian or library director is employed to handle the day-to-day administration of the library.

Director

- Selects and supervises all library personnel and administers all aspects of the library's personnel policy.
- Oversees and directs the day-to-day operations of the library.
- Designs library services to meet community needs/interests. Develop, along with the board, a 3-to-5-year strategic plan.
- With the board, prepares and presents a yearly budget to the governing body.
- Is familiar with city/county ordinances affecting the library, as well as state or federal laws. Keeps the board informed of any legal issues or changes.
- Participates in continuing education activities and professional organizations.
- Serves as the channel of communication between the staff and the board of trustees.
- Advocates for the library through contacts with general public, civic organizations, and public officials. Attends city council and/or county supervisor meetings.
- Maintains a high level of library service, and a friendly, inviting atmosphere within the library.
- Develop a sustained public relations campaign through the use of personal appearances, media coverage, display materials and special promotions.
- Studies and actively supports legislation to improve library services on local, state and national levels.
- Establishes a good working relationship and maintains year-round cordial contact with the city or county commissioners, community leaders, and other government officials.

Trustees should understand the chain of command within the library's organizational structure. The director is the department head of a city or county service and responsible to the governing body for the day-to-day management of the library.

Role of the Governing Body

Many areas of the library's operation may fall under the auspices of the city or county governing body.

Governing body

- Provides funding for the library's operations.
- Approves the library's budget and resource allocation.
- Supports the library's facilities, including buildings and utilities.
- Ensures that the library operates in compliance with local regulations, laws, and policies and provides legal support for contracts.

If a library is a department of and funded by their city or county, library staff are considered employees of the city or county and subject to the governing body's personnel policies. Other areas of library operations governed by the city or county may include acquisition or disposition of real property, inclement weather closures, and filling library board vacancies.

Relationship with the Director, Staff, and Governing Body

The primary role of the Board of Trustees is to ensure that the library is effectively serving the community. Trustees support the director and staff to run the library efficiently and effectively. The Board of Trustees also acts as a liaison between the library and the governing body, serving as local experts and advocates to secure adequate resources that sustain library services. Responsible trustees apply knowledge, respect, and accountability in these relationships:

Relationship with the director

- Respect and support the director's decisions and actions, including times when matters arise which are not easily characterized as being a board matter or a director matter.
- Assist the director in promoting positive public relations for the library; attend library events and be able to answer community members' questions and concerns regarding the library.

Relationship with library staff

- Know who the staff are and their job descriptions.
- Support staff by recognizing contributions, advocating for fair compensation and working conditions, fostering a positive work environment.

Relationship with the governing body

- Be accountable to the governing body ensuring that library management aligns with governing body's expectations.
- Send the mayor, councilors or commissioners information on events, annual reports, and pertinent statistics for the library.

Chapter 2: Trustee Selection, Qualifications, and Orientation

Trustee Selection and Appointment

Recruiting new members to the library board is an ongoing process. Every year, one or two members may go off the board. South Dakota Codified Law 14-2-35 specifies the composition of a public library board in SD to be, "five competent citizens broadly representative of the population of the local governmental unit. One of the citizens shall be appointed for one year, two for two years, and two for three years and annually thereafter reappointments or new appointments shall be for a term of three years or to complete an unexpired term. In addition to the five appointees, the governing body may appoint one of its own members to serve as a full voting member of the public library board of trustees during that member's term of office."

It is highly recommended that new board members be appointed regularly so that a library board is not made up of the same people year after year. New members bring new ideas, new perspectives, and new connections to the board. The board chair position should be rotated among members. Each member should be appointed for a specific term and know when their term expires.

The chairperson of the board or library director must notify the appointing body (city council or county commission) of vacancies as soon as they occur and appointments should be made as soon as possible. In many cities/counties in South Dakota, the mayor and city council or county commission, ideally working with the library board and director, will work together to fill board vacancies. In the event of an unexpected vacancy, the new member will fill the remaining term of the vacancy and could then be reappointed for a new term.

Trustee Qualifications

There are many qualities to keep in mind with ongoing trustee recruitment. A good library board should be a diverse board that reflects the community it serves.

The board should have:

- Gender balance
- A variety of ages
- A variety of occupations and knowledge bases
- Members who participate in community groups and organizations
- Members who are willing to give time to the library by attending meetings, advocating, volunteering at library events
- Members who have an understanding of issues that libraries face in-state and nationwide

The board and library director should create a brochure for prospective trustees summarizing board member responsibilities. Copies should be available at library service desks and it should be linked from the library board section of the website.

Trustee Orientation

Orientation of new board members should begin as soon as they have been appointed. This will help establish a comfort zone with their responsibilities and expectations, as well as get them involved right away, prior to the next official board meeting. A good, organized orientation will include information packets.

Information in the packets could include:

- Schedule of board meetings and copy of library board bylaws which should include expectations of attendance and how meetings are run (see Chapter 9).
- Minutes of the previous year's meetings
- Organizational chart of library staff and positions
- Recent annual reports
- Library projects in progress and challenges or concerns
- Current budget and financial reports
- Library policy manual and schedule for policy review
- A copy of the current strategic plan and technology plan
- Resources and services the library has available to the community
- Board duties including responsibilities of board members vs. the library director (see Chapter 1)
- Director's job description and the process the board uses to evaluate him/her
- Information on library accreditation, librarian certification, and expectations for board continuing education, if applicable
- Information about the library, past and present - it's legal basis, finances, physical facilities, collection
- Pertinent community information including recent community survey results and community demographics
- State and national library information - laws, legislation, services of SD State Library, statewide plans for library development, state and national standards

The packets will help the trustees gain confidence as they begin their new duties and get them involved in board business right away.

The librarian should also provide a tour of the library and the library website, a map showing any branches, stations and bookmobile stops; names, addresses and telephone numbers of other members of the board, information on Friends of the Library or Library Foundation groups if those groups are active in the community.

Trustee Ethics

New trustees want to be good board members, but they are not always familiar with the ethical concerns of a non-profit board. The library should have an Ethics Statement for Library Trustees and this should be shared with new board members.

Ethics Statement for Public Library Trustees - from the Association of Library Trustees, Advocates, Friends and Foundations, a division of the American Library Association

Chapter 3: Policies – Developing, Adopting, Yearly Review

Solid library policies are the foundation of strong libraries. The board of trustees is responsible for the creation, adoption and enforcement of written policies that govern and guide all phases related to programs, operations, and use of the library. Policies are general, flexible statements governing library operations, rules and use. Policies must be tailored to meet changing local conditions and should focus on the library building, collection, services, staff and community. Not every library has the same number of policies, nor should they. Policies need to reflect the services that library offers its community. For example, if a library does not have a meeting room available for public use, then a meeting room policy is not needed.

Library Trustees, along with the Director, have the primary responsibility for policies. Staff members should be involved in the process as appropriate, and policies should be shared with the library's governing body (city or county) to ensure awareness. Certain policies may need review from legal counsel. Boards should revise and update existing policies and create new policies as library services evolve over time. Policies may also be eliminated if they are no longer needed.

Reviewing policies from other South Dakota libraries or out-of-state libraries may be useful in developing or revising your library's particular policies. Library development staff at the SD State Library are available to assist with policy development. Lists of recommended policies and sample policies from other SD libraries can be found at the Library Boards & Trustees webpage.

Once a policy is approved, the library director is responsible for making sure that staff know about and follow policies that affect their work. Based on policies, the director and staff may create internal library procedures. For example, the library board may develop a policy for lending board games. The library director and staff will then develop procedures for purchasing the games, processing and cataloging for checkout, inventorying, and marketing.

Trustees need to be aware that one of their responsibilities related to policies is that they may be called upon to consider any citizen or staff complaints or suggestions in regard to adopted policies. It is important that library board members are aware of all policies and support the library director and staff in enforcing the policies in the case of questions or complaints.

As the Library Board considers new policies, there are questions to ask in the process. The Board may want to consult with legal counsel for some policies.

Is the new policy:

- Consistent with the library mission statement?
- Following local ordinances, state, and federal law?
- One that already exists for other city or county workers? Examples: inclement weather, holiday closures, expense reimbursements, pay raises.
- Consistent with already approved policies? The policy should be applied consistently to all patrons. Inconsistent enforcement can lead to accusations of bias and unfair treatment.

- Reasonable? Penalties and consequences outlined in the policy should be proportionate to the nature and severity of the violation. Minor infractions should not result in excessively harsh penalties.
- Transparent? The policy outlines clear procedures for how it will be enforced, including an appeals process if patrons believe the policy has been applied unfairly.
- Measurable? Be careful of using general statements like "too many" or "too long". What is "too many" overdue books? Set a number.

The policy manual must contain the following minimum information:

1. A statement of the goals and objectives of the library;

2. A detailed library collection development policy which includes selection priorities, the Library Bill of Rights, the Freedom to Read statement and a procedure for handling citizen complaints. Examples of material reconsideration forms for all types of libraries may be found at ALA's Sample Forms page.

3. Regulations for library use should include the following:
    - Hours of service
    - Loan periods and fines (if any)
    - Replacement of library materials
    - Policy in regard to abuse of library privileges
    - Patron behavior/code of conduct
    - Acceptance or rejection of gifts
    - Use of library meeting rooms
    - Exhibits by individuals or organizations

4. Staff regulations must include the following: (NOTE: Most libraries are governed & funded by their city or county, and staff regulations would be the same as for that entity.)
    - Leave, vacation, sick leave, holidays
    - Travel time and expenses to library meetings, conferences, etc.
    - Other fringe benefits
    - Staff responsibilities, job descriptions and salary schedules

Policies should be reviewed regularly and revised accordingly. The director and board should establish a yearly schedule for policy review. Larger libraries with many policies may want to consider reviewing 2-3 policies at each board meeting. A policy manual should be available for public review and it is recommended that library policies be posted on the library website.

Disaster Preparedness

Libraries should consider developing a disaster preparedness policy as a proactive approach to managing risks and mitigating the impact of disasters on library operations. Resources exist for disaster planning including guidebooks, webinars, toolkits, and policy examples from many library agencies such as:

Disaster Preparedness Toolkit from State Library of Iowa
Library Disaster Preparedness & Response Resource Guides from American Library Association

Chapter 4: Library Budgets and Finances

What Trustees Should Know

One of the most important obligations of the board is to make certain that sufficient funding is available to operate the library properly. The budget reflects priorities of the library and determines how resources are allocated. Each board member should know:

- The library's financial background
- The unit(s) of government allocating the local appropriation
- The entire resources of local tax monies and the library's fair share
- Grants available from all sources (government and private foundations)
- Any other possible sources of support. (For example: a bond issue, endowments, gifts, donations, fines and fees.)

A budget is an expression of the library's strategic plan and objectives in financial terms. Before a budget can be formulated, a strategic plan for library services should be developed and goals and objectives established. If the community is involved in the planning process, the library and its plan will be supported throughout the community.

The library's budget must be realistic. The library is only one of many services provided by the unit of government. Funding from other sources such as federal monies should be considered supplemental and never as a means of lowering local appropriations.

Library budgets are prepared under the same guidelines as their city and county departments. The library's accounting system must comply with that used by the governing body. The budget should be detailed enough to assure the authorities that the money will be spent in compliance with the agreement. However, an extensively detailed budget could result in money being tied up in accounts for extended periods of time.

The Budgeting Process

Formulate the library budget

This is done primarily by the director and staff. Both board and staff should have a clear understanding of the budget process. This first step in preparation of the planned budget should include various approaches to achieving the goals and objectives that are feasible in terms of anticipated resources and services. Programs and services should be evaluated by director and staff to determine if changes are needed or even if something should be eliminated. Often, the budget from the previous fiscal year will be used as a template to develop the new budget. Look at the previous year's actual costs to determine needed changes.

Use statistics from the public library annual reports submitted to the South Dakota State Library to compare your library situation with other similar libraries and to understand your city/town or county government's level of effort.

Present the budget to the library board
The library director must explain the budget in depth so that it can be discussed. All anticipated questions that the governing body may ask should be taken into consideration during the discussion. Board members must be well informed and prepared to answer any budget questions which may arise. Budget discussions should be open to everyone: the general public, the press, the Friends of the Library group, and government officials.

Present the budget to the proper allocating officials
The library director presents the budget to the governing body. Board members should accompany the library director to support the budget presentation.

The normal expenditures that most libraries have to budget for include:

- Salaries
- Benefits (social security, retirement, workers' compensation, health insurance)
- Utilities
- Building maintenance (cleaning, insurance, maintenance, repairs)
- Equipment and software
- Collection materials
- Databases and e-content
- Programs
- Outreach
- Special collections
- Library vehicle
- Professional development and memberships
- Operating expenses (printing, postage, travel, supplies)
- Capital expenditures (a major building project or major equipment purchase)

Gift funds

Community members like to give money to many organizations, and the library is often a beneficiary of community goodwill. SD Codified Law 14-2-41 (noted below) allows trustees to accept gifts and grants. Appropriate policies relating to acceptance of gift and grant funds should be developed. Gift money should be estimated and noted in the library budget. It is important for all to understand that gift funds supplement the budget and should never be assumed to be guaranteed.

Library Friends and Foundation Groups

Some communities have library Friends and/or Foundations groups. These are non-profit groups that usually hold 501(c)3 status. Friends groups help raise money for library projects and purchases and are often made up of library supporters. Foundations groups can differ in that they sometimes focus on bigger projects like capital campaigns and include library users and non-users. See Chapter 11 for more information on Friends and Foundations groups.

SD Codified Law 14-2-41. Powers of trustees

Each board of public library trustees may:

(1) Accept any gift, grant, devise, or bequest made or offered by any person, private agency, agency of state government, the federal government, or any of its agencies, for library purposes. Each donation shall be administered in accordance with its terms.

(2) Establish a special public library gift fund. The moneys in such fund shall be derived from all or any part of any gift, bequest, or devise, including the interest thereon. Such gift fund shall be a separate and continuing fund and no moneys in such fund shall revert to the general fund of any local governmental unit.

Chapter 5: Hiring and Evaluation of the Library Director

If a library is a department of and funded by their (city or county), the library director is considered an employee and subject to that governing body's hiring process. However, library boards should be part of the process of hiring a new library director by having one or two members as part of the hiring committee.

Library boards play an important role in hiring and evaluating the library director, as the director's leadership and management skills significantly impact the library's success.
When the board receives a director's written resignation, it should conduct an exit interview. If the director is leaving in good standing, listen carefully to any recommendations for the future. In any case, look carefully at the library's current situation. Review compensation and benefits to be sure they are reasonable.

Preparing for the Director Search

The entire board should have a good grasp of the work that a public library director does to allow for participation in the hiring process. If the library director is part of a municipal or county system that maintains authority to hire the director, the board should still be part of the hiring process.

Evaluate the job description
Board members should review the job description to make sure it is up to date, and advocate having one or two board members as part of the hiring committee. The State Library provides useful information on job descriptions and salary information.

Post the job announcement
The board should review the job advertisement before it is posted. Once the job ad is complete, it should be posted widely. The board can assist in this process by sharing it throughout the community and ensuring the ad is posted on state and regional library association job lists, and social media if appropriate. For positions in larger communities, they may also consider notifying library schools, posting on job sites and/or purchasing an online ad through the American Library Association.

Form a search committee
The municipal or county system may take the lead in forming a search committee and developing the interview process. However, the library board chair should be part of the committee, and possibly another board member. The board representatives should report on the progress of the search to the rest of the library board. Other search committee members could include a library staff member, other city/county department heads, and community members.

Prepare for interviews
The library board should work with the governing body to develop questions that will be asked during the interviews. Seek input from library staff and community members to gather perspectives on the qualities they value in a library director.

Selection of and Hiring the Library Director

Review the applications
Many times, the city will receive the applications before forwarding to the library board. Evaluation criteria should be developed and used to rank them. Some qualifications to consider in ranking candidates are:

- Attitude of service to the community and enthusiasm for librarianship
- Philosophy of library service attuned with that of the library's mission statement
- Ability to explain how his or her experience and talent can be used as library director
- Understanding of the role of trustees
- Successful record of working with board and community leaders, and supervising staff
- Willingness to become involved in the community and ability to be comfortable in relations with the public
- Knowledge of basic principles such as intellectual freedom
- A reasonable grasp of the library's situation, budget and plans based on information supplied to the candidate in advance
- Commitment to continuing education for the director and staff

Interview the candidates
Your city or county government may take the lead in the interview process. The search committee should be able to agree on three to five candidates to be called for interviews. A phone interview with preliminary candidates may be helpful to determine final interviewees. The board should consider providing candidates an information packet including the library's strategic plan, budgets for the last several years and community information. Members of the search committee should have the complete list of interview questions for taking notes regarding each interviewee's answers.

Evaluate the candidates
Once all of the finalists have been interviewed, the search committee can compare their notes, discussing and ranking the finalists according to the evaluation criteria. The library trustees who served on the search committee should report the results of the search to the board. Reference checks should be conducted verifying candidates' credentials, experience, and references to ensure their qualifications and suitability for the role.

Make the hiring decision
Once the hiring process is complete (either through the governing body or library board alone) and a candidate has accepted an offer, the library board should take formal action at the ensuing board meeting to officially appoint the new librarian. Unsuccessful candidates should be notified in writing that a director has been selected.

Evaluating the Library Director
It is the responsibility of the board to regularly evaluate the director. A formal, written evaluation should be completed annually. However, the board can be continuously evaluating the director by being aware

of programs, new services and resources at the library and listening to what community members are saying about the library.

- The board might consider questions such as:
- Has the director managed the library so that it can provide the intended services?
- Has the director managed the staff so that operations are friendly, efficient, and cost effective?
- Is the community visibly pleased with the public library?
- Has the director been a leader in making the community aware of the library as an important service?
- Has the director made progress in achieving the objectives outlined in the library's plan?
- Has the director provided sufficient information to the board so that it can perform effectively?
- Has the director kept in touch with new trends in library service and relayed these to the staff and the board?
- Has the director prepared and managed the budget effectively?

General Suggestions on Director Evaluation

Keep it positive
Performance evaluations provide the opportunity for feedback and goal setting. The board should collaborate with the director to set realistic and measurable goals that align with the library's strategic plan. The evaluation process should be a positive effort that highlights the director's strengths as well as identifying areas for improvement.

Make it comprehensive
Evaluation criteria should encompass a broad range of aspects including leadership, staff management, professional development, strategic planning, and community engagement. The board should gather input from staff, the governing body, and other stakeholders as well. Invite the library director to contribute a self-assessment, reflecting on their achievements, challenges, and professional development needs. This can facilitate a more constructive evaluation process.

Put it in writing
If an evaluation document does not exist, then the board should create one. A written evaluation process is transparent and helps ensure that all board members are on the same page regarding the director's performance. Upon completion of the evaluation, the document should be dated, and a copy shared with the director. Offer a copy to the governing body human resources department.

Remember that effective communication, transparency, and a commitment to the library's mission are essential throughout both the hiring and evaluation processes. The library board's role is to ensure that the library director is equipped to lead the library in fulfilling its mission and serving its community effectively.

Dismissing/Termination of the Library Director

Probably the most stressful situation a library board can face is the potential dismissal of a library director. A board should not consider a dismissal process without communication and consultation with the municipal or county system that may have authority in the matter. Legal counsel may also be needed.

Directors are usually dismissed only after serious infractions of library policy, violation of the law, or very poor performance coupled with unwillingness or inability to improve. It is essential that the reasons for dismissal have been carefully documented. The board has a responsibility to ensure that personalities and biases are not factors in any dismissal decision. The dismissal and/or appeals procedure should be described explicitly in the personnel policy.

Chapter 6: Strategic (Long-Range) Planning for the Library's Future

Planning is an integral part of any organization's growth and development. The board of trustees, the library director and the library staff are charged with serving as caretakers and stewards of the library system. It is their job to keep the mission and goals of the library in perspective and on track by constantly reviewing services and policies to ensure library service is accessible to all segments of the community.

What is a strategic (long-range) plan?

Every public library should have a long-range plan. Boards and directors continually shape the services, building(s), technology and staff of the library through long range planning. Without a basic guide or plan it would be difficult, if not impossible, to make decisions concerning appropriations, the need for expansion, allocations for programs or staff development. A plan assists the board of trustees and the library director in making the best decisions for the future of the community being served and approves the course of action and time schedule to implement those plans.

To provide the community with efficient, progressive library service, the board of trustees and director should base the plan upon their knowledge of the community, community expectations, resources of the community and realistic projections of the future needs of the community. The purpose of planning is to move the library forward effectively to meet the needs of the entire community.

Developing a strategic (long-range) plan

A library should undertake a formal planning process every three to five years to reevaluate the library's service to the community and its future. A long-range/strategic plan should include:

Statement of library mission, goals, and objectives

- Mission Statement - a tightly worded statement of the library's purpose for existing. Mission statements are usually expressed in a few sentences. They should be specific enough to serve as a guide for the rest of the plan without being too wordy. A mission statement is the most basic and permanent part of the plan. Mission statements are seldom changed, and from them flow the goals, objectives, and action statements.
- Goals - broad statements of what the library should be doing in the future. Goals should be consistent with the mission statement.
- Objectives - statements of specific results to be accomplished in support of achieving a goal. When possible, objective statements should be quantifiable, i.e. capable of being counted or measured with definite time frames. This allows for determination of the successful accomplishment of a goal.
- Action Statement – a statement describing the means used to support the mission statement.

Review of library strengths and weaknesses

- What assets does the library have now that can be built upon?
- Is there an appealing facility, a friendly staff, a superior reference service, a strong friends group?

- What strengths does the library need to build?
- Is there adequate space for children, poor signage, an invisible interlibrary loan program, or poor public relations?

Community analysis and needs assessment
Study the local environment--the community's political structure and how the library fits in, the geographic and demographic data for the community and the library, the economic factors affecting the community and the library, including revenue sources and budget. If projections for the community have been made, examine them. If not, develop such projections based on present and anticipated community development.

A plan for continuous review and updating
Determine a basis for evaluating progress toward reaching the goals and objectives. Once developed, the plan should be approved by the Board and shared with the library's governing body, staff, and community.

Planning is an on-going process. Strategic plans are adjustable. External factors such as shifts in technology, changes in user needs or staffing may require that the library's goals, objectives or timeline be reexamined. Unless some crisis requires immediate updating of the plan, the plan should be reviewed at least annually with a complete update every three to five years.

As part of the plan, the library should also develop a technology plan. This plan will help guide the need to upgrade computers and other technology within the library and help with budget planning for new technology.

Implementing the strategic plan

Establishing a timeline and setting priorities for accomplishing objectives is important in ensuring that the plan is effectively implemented and that resources are allocated efficiently. The following steps can guide library stakeholders in setting a reasonable schedule for meeting the plan's objectives.

1. Examine varying approaches to reaching the objectives.
2. Select the most feasible approach in terms of likely resources.
3. Divide the selected approach into steps and place the steps into time frames.
4. Assign priorities; that is, decide which steps have to be accomplished, which should be accomplished, and which would add to the total effect but are not essential. This ranking will dictate the allocation of funds and other resources.
5. Determine who will be responsible for accomplishing each objective and implement a system for monitoring and progress. This could be regular check-ins and monitoring performance indicators, for example program attendance or circulation.

A collaborative effort from the board and director, along with an understanding of the community will result in the strongest strategic plan and the clearest vision for a library of any size. Continuing to cultivate the plan and having deliberate discussions about planning progress reveals what was accomplished in the past year. It also helps decide whether unmet goals are still worthy of moving

forward and whether new goals and objectives should be added. Creating a strategic plan is the best way to guide and shape a library and its service to the community.

Resources

- Strategic Plan Template
- Strategic Planning Community Survey Template
- SWOT Analysis Template
- Strategic Planning Table and Timeline

Chapter 7: Advocacy, Fundraising, and Public Relations

Public library trustees play a vital role in supporting their libraries through advocacy, fundraising, and public relations.

It may seem like an obvious statement, but trustees should be library users, checking items out, and attending and helping with programs. Trustees who use the library understand the library's public-facing side and gain first-hand experience regarding the library's services. Being active participants in library activities enhances trustees' insight and credibility when it comes to being effective advocates, fundraisers, and public relations representatives for the library. These are all important trustee roles that help raise awareness of the library's value, secure resources, and foster positive relationships with the community.

What trustees need to know

Advocacy
In an advocacy role, trustees should be pushing for adequate funding, seeking technology advancements, fostering community relationships, and supporting the library staff in terms of salaries, benefits, and working conditions. As an advocate for the community library, boards should understand the value and importance of libraries and be willing to communicate that value to the community the library serves, city/county government leaders, and other decision-makers.

Library's Value
Understand the library's impact on the community's education, information access, cultural enrichment, and economic development. Communicate these benefits to stakeholders, policymakers, and the public.

Engage with Officials
Build relationships with local, state, and federal officials. Ask these leaders to get involved and thereby support the library by: reading at storytime, creating READ posters, presenting a program on a hobby or travel experience, participating in a summer reading program activity. Advocate for library funding and policies that align with the library's mission. Attend meetings, provide data, and share stories of the library's positive impact.

Community Engagement
As community members, trustees often are the recipients of questions and comments (good and bad) about the library. Trustees should not make promises but should communicate that the feedback will be shared with the library director, staff, and other board members. The board, along with the library, should ask the community for feedback through surveys.

Stay Informed
Know the programs the library offers, the services and resources provided to the community. Attend library programs and events. Keep up to date with legislative and policy changes that affect libraries. Collaborate with library associations and networks to access advocacy resources and training.

Fundraising
Fundraising is a supplement to public support. Not only do funding campaigns raise money for specific needs or projects, but they raise community awareness of the library.

Diversify Revenue
Explore various fundraising strategies beyond public funding, such as grants, donations, partnerships, community foundations, and sponsorships. Have an event on Library Giving Day.

Campaign Planning
Develop fundraising campaigns aligned with the library's needs and goals. Set clear targets, timelines, and communication plans.

Donor Cultivation
Build relationships with potential donors, local businesses, and philanthropic organizations. Highlight the library's impact and tailor fundraising pitches to resonate with their interests. Place information about how to donate to the library at library service desks, on the website, on social media and around the community, even at local funeral homes.

Transparency
Clearly communicate how donations will be used to benefit the library. Provide updates on the progress of fundraising initiatives and the impact of contributions.

Recognition
Make the effort to let people know that their gifts are valued. Some ways to recognize library donors include thank you notes, plaques and displays, receptions, newsletter articles, social media posts, and thank you videos. Be thoughtful about recognizing library benefactors and respect their preferences for privacy or a more public acknowledgement.

Public Relations
To emphasize that the library is an essential part of the community, trustees should be seeking opportunities to tell the library's story all year round and to as many audiences as possible.

Message Development
Craft a compelling and consistent message about the library's mission, services, and impact. Tailor messaging to different audiences, such as community members, media, and stakeholders. Make sure the director, staff, and trustees share the same messages throughout the community.

Media Relations
Develop relationships with local media outlets. With the library director, issue press releases, share success stories, create program flyers, and do radio and TV announcements.

Social Media and Online Presence
Utilize social media platforms and the library's website to share news, events, and engaging content. Showcase the library's role as a community hub.

Community Outreach

Participate in local events and fairs and talk about the library at club meetings or invite the director to present information to promote the library's services and engage with residents.

Remember, effective advocacy, fundraising, and public relations require collaboration, creativity, and persistence. Trustees should work closely with library staff, community members, and partners to ensure the library's ongoing success and sustainability.

Chapter 8: Marketing the Library

Marketing helps to create awareness about the services, resources, and programs your library offers. Effective marketing strategies bring in new users, improve awareness of new services to current users, and showcase the value of the library to your community. If board members and library staff don't share information about the library out in the community, then only regular library users will know what the library offers.

Marketing Concepts to Keep in Mind

Trustees do not need to be marketing professionals to apply marketing concepts to a library of any size.

Market research

Gather feedback from library users to understand their needs and preferences. Use this information to improve marketing strategies and service offerings. This is informed by community surveys, focus groups, etc. You will have done some of this work when you drafted your library's strategic plan.

Branding

Establish a consistent visual identity and messaging for the library. Use this branding across promotional materials, signage, and online platforms.

Targeted Promotion

Understand your community's demographic makeup and tailor marketing efforts to specific audiences and demographics. Highlight relevant services and programs that address their needs and interests.

Partnerships

Collaborate with local businesses, schools, community organizations, and government agencies to co-promote events and programs.

Key Roles for Boards and Staff

Attracting publicity and encouraging good public relations for the library is all part of marketing.

Connecting with community

It is imperative that community leaders be advocates of the library. Board members should build relationships with these officials to get them involved in supporting the library. Talk to local officials and even state legislators about the importance of and needs of libraries. Encourage the library to sponsor one annual food event and invite community leaders.

Marketing inside the library

Library users are already library advocates, but library staff and boards still need to keep them engaged. Not all patrons are aware of the full range of services the library offers. Fortunately, it's easy to get the message out to library users.

- Use displays, posters, and signage.
- Produce and place brochures strategically or insert informational bookmarks into books checked out.
- Take advantage of programs to distribute information about upcoming events.

- Use digital displays in the library.
- Make sure library staff are knowledgeable about library services and effectively promote them to patrons.
- Hold workshops that teach people to use library resources, such as genealogy workshops, and trainings to teach users how to download e-books to their mobile devices.

Marketing outside the library

Marketing services outside of the library helps you reach people who do not regularly use the library as well as those who do.

- Be sure your library's website shows the full range of services you offer and provides access to the virtual services you offer such as your e-book services, your library catalog, and the research databases provided by the State Library.
- Have active social media accounts where you post announcements of upcoming events, promotional videos, and post-event photos.
- Engage in email marketing. Gather email addresses at library programs, via a sign-up box on the library website, etc to create targeted messages.
- Promote the library's public computers, Wi-Fi internet access, and computer classes.
- Have a presence at community events such as park events, farmer's markets, local fundraising fun runs/walks, parades. Partner with other community organizations to brainstorm community events in which the library can participate.
- Have adequate signage around town so that residents and visitors can find the library easily. Contact the SD DOT about obtaining directional highway signs for the library.
- Take opportunities to speak about the library at service organization events, etc.
- Advertise the library and specific services via newsletters, news releases, radio and television announcements, and community organization newsletters.
- Have an active plan for community outreach. Contact schools, senior centers and churches, and speak to civic groups.
- Hold library programs in other locations or open community spaces. For example, host story walks, storytime or summer reading celebration at the park, or movie/book discussions at a local theater, etc.

Hard questions

The library board and staff should ask some hard questions about how effectively the library's profile meets its mission.

- Do library staff and board members recognize current demographic, education, and economic trends so that the library can offer services appropriate to the needs and interests of the community? For example, are there materials, programs, and resources for early literacy, homework help, technology training, and veterans' assistance?

- Is the community aware of the library? Is the library visible? Is there signage? Does everybody have a library card?
- Is the library a welcoming place? Is it attractive, accessible to people with disabilities, well organized, comfortable, and in good repair? Are staff members friendly and helpful?
- How do people know about the library's services? Do non-users know the library offers interlibrary loan, children's storytimes, eBooks, genealogy materials, popular videos, toys and games, and services for specific populations?
- Does the library have active partnerships and communications channels for awareness, fundraising, and programming? Does it have a reputation for showing appreciation to people who help?
- Is your library as busy as other libraries? What percentage of your service population are registered users? Compare per capita statistics for library visits, circulation, and program attendance. The State Library makes comparative statistics for SD libraries available.
- Who is not using the library and why? Use community surveys to learn more about the barriers and perceptions that keep people from using the library. Are there diverse populations in your community that don't understand American libraries and how they work? Real example: a community in Colorado discovered a certain population of people didn't use the library because in their home country, only the 'elite' could be library patrons. Once they understood that anyone could use the public library, they became users.

Resources

ALA Marketing Strategies

Chapter 9: Effective Board Meetings

South Dakota Codified Law, SDCL 14-2-40(5) states that "Each board of public library trustees shall ... meet at least once during each quarter of the year." The library director attends each meeting and serves as secretary to the board. Active libraries generally find it beneficial to meet monthly.

Bylaws

Bylaws are rules written and adopted by the board for operating its own meetings or affairs. The library board should establish procedures for amending and changing the bylaws. Bylaws are essentially an internal document outlining how the board conducts its business.

Examples of SD Library Board Bylaws

- Brookings Public Library Policy Manual (see By-Laws, pages 3-7)
- Freeman Public Library - Trustee Bylaws

The board of trustees must have an organized routine to conduct its affairs effectively, as outlined in its legally required bylaws in SDCL 14-2-40(2):

- Place and time of regular meetings
- Order of business
- Officers, committees, and their duties
- Date of annual meeting to consider the budget (if one is held)
- Procedure for calling special meetings
- Definition of a quorum
- Parliamentary rules to be followed
- The role of the library director
- Procedure for amending the bylaws
- Limitations on board members

Open Meetings

The Open Meetings Law, requiring that all meetings of government bodies be held in public, helps to encourage transparency by public boards. Library board meetings should be conducted following the South Dakota Open Meetings Law, SDCL 1-25.

Here are some key aspects of compliance with South Dakota's open meetings laws:

SD Codified Law 1-25-13
Requirement to have an annual review of open meeting laws and to acknowledge in official meeting minutes that the review was completed.

Public Notice
Meetings must be announced in advance, and notice provided to the public with details of the date, time, location, and agenda. The board chair and the library director should prepare the agenda and send it to the board members prior to each meeting. Include any documents that the board may need to review ahead of the meeting.

NOTE: If you are sending email to all board members, remind them that discussion needs to take place at the board meeting, not via email. Discussions via email can be considered as unofficial board meetings and could be in violation of SD Open Meetings Laws.

Accessibility
Meetings should be open to the public, and reasonable accommodation should be made for individuals with disabilities.
Executive Sessions: Closed-door sessions are allowed under specific circumstances, such as discussing personnel matters or pending litigation. See SDCL 1-25-2.

Transparency & Record Keeping
Accurate minutes and records of meetings must be maintained and made available to the public.
See SDCL 1-27-1.17. Minutes are the official record of board meetings and actions taken and are also the best protection the public library board can have if their actions are ever questioned.

Other resources regarding South Dakota's open meetings laws:
Open Meetings Law and Open Records - from SD Municipal League

Parliamentary Rules
The board chair should conduct a controlled meeting with directed, pertinent discussion. Board meetings should be conducted according to parliamentary rules. For example, see Robert's Rules of Order.

Meeting Agenda
The agenda sets a clear direction for the library board and the public. The library director and board president should prepare the agenda allowing time for members to add agenda items. Boards are required to provide public notice of the meeting and the proposed agenda at least 24 hours preceding the meeting. See SDCL 1-25-1.1

Template for the order of business at a regular board meeting:

- Roll call (must have a quorum to conduct official votes)
- Approval of previous meetings' minutes
- Approval of agenda
- Correspondence and communications
- Report of the librarian
- Financial report and/or approval of expenditures
- Reports of any committees
- Unfinished business

- New business
- Public Comment (if needed)
- Executive Session (if needed)
- Adjournment

Notes on public comment: If a public comment section is needed at a board meeting, a specific procedure should be outlined. For example, require those who wish to speak to sign in before the meeting begins and call on them when the time comes for public comment. It may be necessary to create time limits to ensure that everyone who has signed in to speak gets a chance to do so.

To make every meeting meaningful, complete routine business quickly to allow time for open discussion on long-range planning, policy review, methods of extending service to unreached portions of the community, and other big picture topics.

Chapter 10: Intellectual Freedom

The role of a public library in a democratic society is to ensure free and open access to information and materials for all as guaranteed by the First Amendment of the Constitution of the United States. Library boards protect and defend intellectual freedom. Trustees must leave personal viewpoints, beliefs, politics, etc., outside of the library when they are acting in their official roles as library board members.

The American Library Association defines Intellectual Freedom: "The right of every individual to both seek and receive information from all points of view, without restriction. It provides for free access to all expressions of ideas through which any and all sides of a question, cause or movement may be explored." ALA Intellectual Freedom & Censorship

Intellectual Freedom and Collection Development (or Materials Selection) Policies

Library staff responsible for developing the collection are selectors, not censors. Selectors believe in the individual's right to examine and evaluate materials and make personal choices about them; censors believe in examining, evaluating and choosing materials for others. The collection development policy should support the right of all members of the community to have access to a wide range of materials, even if that includes items which some people might find objectionable.

The selection of library materials has a strong connection to intellectual freedom. Every library should have a written collection development policy. Within that policy, there should be a section that specifically addresses citizen complaints to library materials. It is important that the library board support decisions of their director in implementing the policy which they, the board members, have adopted.

For examples of Collection Development Policies from South Dakota libraries, visit the Library Policies Section of the Trustee Page .

State law also requires that libraries have a policy in place that prevents minors from obtaining obscene materials from the library. This policy may be a part of the collection development or services policies. State law also requires this policy to be posted on the library website.
For a definition of obscenity, visit SD Codified Law 22-24-27.

Local library boards still maintain local control over materials in the library and have been given authority from the state to determine what is obscene based on the definition in SD Codified Law 22-24-27. The law governing this policy can be found under SD Codified Law 22-24-56.

If you have questions, do not hesitate to contact the South Dakota State Librarian.

Challenges to Materials and Policies

Complaints about library materials should be handled according to previously approved policies and procedures, which should clearly define a method for handling complaints. The library director should handle any initial complaints and inform the board of any situation. Situations involving intellectual freedom (censorship) usually contain a mixture of board and director responsibilities. It is imperative

that the board and the director discuss the issues fully and together determine a course of action. It is also important that those who question materials should be treated professionally and respectfully.

Suggested procedure:

1. Patron complains about an item
2. Patron is given a "request for reconsideration" form to complete and turn in
3. Library director reviews the material in its entirety, makes a decision, and communicates in writing with the patron
4. If patron is not satisfied with director's decision, an appeal to the board can be filed
5. The board will review the material in its entirety, place an agenda item for the next board meeting to make a decision, and communicate the decision in writing to the patron
6. A new appeals process was approved by the 2025 State Legislature. If a complainant is not satisfied with a library board/governing body decision, the matter can be subject to judicial review. See SDCL 22-24-56(2).

Sample reconsideration forms from the American Library Association

Access to Information and Internet Filtering

Access to information must be balanced with legal requirements. If your library uses federal funding to pay for computers, networking equipment, and/or internet services you must adhere to the Children's Internet Protection Act (CIPA) measures, meant to protect minors form obscene content and abuse on the internet. Libraries are expected to enforce the use of filters that block access to certain internet sites. While the intention is to protect children from accessing inappropriate material, the filtering software may sometimes block legitimate, educational, or constitutionally protected content, restricting access to information. The library may disable filters for adult users to enable access for research and other lawful purposes.

The state law governing the filtering of public library computers is SD Codified Law 22-24-56.

Reminders:

- Patrons are free to reject for themselves materials that they disapprove of, but not to use censorship to restrict the freedom of others.
- Public libraries are for everyone. There are those who want to limit what others may read, see, or listen to, but libraries provide the right of unrestricted access to the expressions and beliefs of others.
- Parents and guardians are responsible for supervising library use by minors.

Libraries uphold the principles of intellectual freedom, which include providing access to a wide range of ideas and viewpoints. Regardless of personal viewpoints, beliefs or politics, trustees must act in their official roles as library board members to ensure that all community members have the right to access a wide range of information and knowledge. A useful slogan to remember when challenges to library materials occur is: *Don't defend the item being challenged, defend a person's right to read it*.

Reporting Challenged Materials or Displays

Inform the ALA Office of Intellectual Freedom and appropriate organizations concerned with intellectual freedom. Contact the SD Library Association and the SD State Library. There is value in the support and assistance of other agencies.

Resources

ALA Intellectual Freedom Advocacy & Issues

Library Bill of Rights

Freedom to Read Statement

Freedom to View Statement

Unite Against Book Bans

ALA Office of Intellectual Freedom Challenge Support

Access to Library Resources and Services to Minors

Chapter 11: Library Law and Legal Matters

It is important for board members to understand the essentials of a number of federal, state and local laws. Please consider this chapter to be information only, not legal advice.

Library boards should have a basic understanding of how local, state, and federal laws and ordinances affect library service. The more informed board members are on laws and legal issues that can affect the library, the better prepared they will be to make decisions that ensure the library is operating in compliance with all relevant regulations. There are occasions when a library will need to seek legal counsel. Many legal questions can be resolved by consulting with city or county attorney.

State Statutes for South Dakota Libraries

SD Codified Law governs the formation and operation of libraries through state laws and regulations. Trustees should be aware of state law pertaining to libraries in South Dakota.

- Public Libraries - South Dakota Codified Law governing public libraries
- Resolution or ordinance to provide public library services
- Board of Public Library Trustees – Appointment and Terms of Members
- Contract with established library--Annual appointment of additional trustees--Number proportional to contributed funds
- Joint public library--Board of trustees--Proportional appointment
- School Board contracts for library services
- Per diem and expenses of trustees
- Duties of Trustees
- Powers of Trustees
- Confidential Library Records
- Meetings of Public Agencies

  See specifically:

  - 1-25-1: Official meetings open to the public--Exceptions--Teleconferences--Violation as misdemeanor.
  - 1-25-1.1: Notice of meetings of public bodies--Violation as misdemeanor.
  - 1-25-2: Executive or closed meetings--Purposes--Authorization--Misdemeanor.
  - 1-25-13: Annual review of open meeting laws—Acknowledgment.

Board members should know and follow these laws and act in the best interest of the community.

Local Statutes

There may be local ordinances through the city, county, or other governing body. Trustees should be aware of local requirements. For example, building codes, safety regulations, signage regulations, parking availability, managing food services and alcohol on library premises, use of meeting spaces, behavior in public spaces, and nuisance ordinances.

Federal Laws

Numerous federal laws affect public libraries. A small selection of important federal laws is included below:

American with Disabilities Act (ADA)
Civil rights legislation that makes it illegal to discriminate against people with physical, mental, or emotional disabilities.

Children's Internet Protection Act (CIPA)
Libraries that receive E-Rate discounts or LSTA grants for internet connectivity or computers must filter all computers for defined categories of images.

E-Rate
E-Rate is the commonly used name for the Schools and Libraries Program of the Universal Service Fund, which is administered by the Universal Service Administrative Company (USAC) under the direction of the Federal Communications Commission (FCC). The program provides discounts to assist schools and libraries in the United States to obtain affordable telecommunications and Internet access. Libraries participating in E-rate must comply with the program's regulations.

Intellectual Freedom
The First and Fourth Amendments to the U.S. Constitution are integral to American librarianship. They are the basis of the concept librarians call intellectual freedom. Intellectual freedom accords to all library users the right to seek and receive information on all subjects from all points of view without restriction and without having the subject of one's interest examined or scrutinized by others.

Library Services and Technology Act
A means of national funding for public library development and other related programs administered by the Institute of Museum and Library Services (IMLS). The Grants to States program, awarded by IMLS to state library administrative agencies, is the largest source of federal funding support for library services in the U.S. • USA Patriot Act - A set of federal anti-terrorism measures that lowers the standards of probable cause for obtaining intelligence warrants against suspected spies, terrorists, and other enemies of the United States.

General Legal Matters

Trustees should also be aware of some general legal matters that impact libraries by governing how libraries provide access to library materials and resources.

Copyright law and fair use regulate how libraries can use and provide access to media and public performances for copyrighted works.

Licensing agreements with vendors which dictate the terms and conditions by which the library can use and share digital resources such as ebooks, databases, and software.

Contact the State Library at 605-773-3131 or email for guidance.

Chapter 12: Friends of the Library and Library Foundation Organizations

Friends of the Library groups and library foundations can play important roles in supporting library services and fundraising for large and small library projects. Library trustees should have a good understanding of the advantages and limits of these organizations. The library board should work to cultivate a collaborative relationship with Friends or Foundation groups so that their projects are aligned with the library's long-range plan.

Friends of the Library

Friends groups are usually established by a core group of library supporters from the community. They are a volunteer group that often focuses on financial support and projects for the library. They can have a variety of missions including promoting the library through advocacy and marketing, providing volunteer service, and fundraising for large or small library projects. Specific examples might include organizing a community book sale, supporting smaller library programs (local author or musician), and coming up with other ideas to fundraise for the library like selling calendars or cookbooks or having raffles.

Many Friends groups are tax exempt 501(c)(3) entities. The monies raised by a Friends group belong to that organization — they are not library funds until the Friends give funds to the library. Other than what is written in the Friends articles of incorporation or agreed to in a signed agreement between the Friends and the library board, the Friends are not required to provide funds to the library as the library wishes. For the best interests of both the Friends and the library, it is strongly recommended that both parties sign a written agreement that clarifies and dictates the responsibilities, duties and expectations of each organization to the other. Current board members and library staff can become members of the Friends group. However, to avoid conflicts of interest, they should not hold office in the Friends group.

It is important to note that Friends groups are not part of the library, nor are they governed by the library. It is good library practice for a library board member to attend Friends' board meetings as an official representative of the board. The same is true for the Friends' board, selecting a member to represent the Friends at library board meetings. Time on the agenda can be set aside for a Friends report.

Library Foundations

A Library Foundation is separate from the library board, Friends group, or funding authority. Their purpose is to raise a large sum of money, often for a building project or perhaps an endowment. A library foundation ensures that money stays with a library for library purposes. In addition to seeking large monetary donations, Foundation groups may sponsor major programs like a popular, national author or dinner event where attendees purchase tickets.

As with the Friends, contributions are tax deductible with 501(c)(3) status and bylaws determine membership, officers and the dispersal of funds. Much of the money raised by the library foundation will be local money. 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.

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, or know, many of the people who might make sizable contributions to the foundation.

Resources

United for Libraries Foundation Groups

United for Libraries Friends Groups

Friends & Foundations Fact Sheets

Applying for tax-exempt status with the IRS

Thorsen, Jeanne. "Establishing a Library Foundation" (ALA PDF)

Chapter 13: Library Buildings

Library trustees have a major responsibility to make sure that the library facility or facilities are maintained for public comfort and safety and are durable, comfortable, welcoming, and efficient. Library buildings that are outdated, poorly maintained, overcrowded, or otherwise inefficient will project a negative image of the community and the impression that libraries are not important.

Libraries of the future are being seen as hubs in a network of services that extends beyond library walls. Some of these services could include space for telehealth meetings, cafés/coffee shops, business centers, kitchens for library and public use, maker spaces, recording studios, digital media labs, spaces for unconventional collections like tools and toys.

Every public library should have a long-range plan for the library facility. This plan should consider:

- Needed repairs and improvements;
- A timeline and fiscal plan for remodeling, expansion, or a completely new library building;
- Compliance with the provisions of the Americans with Disabilities Act;
- Appropriate library technology, which includes input by staff, system consultants, and state library consultants; and
- Safety and security.

Maintaining an Existing Building

Maintaining a library involves various pieces to ensure functionality, safety, and overall appeal. Trustees play a role in making sure adequate resources are allocated for upkeep of the library building and grounds, including:

- Regular cleaning
- HVAC system maintenance
- Lighting
- Security Systems
- Fire Safety
- Plumbing, Water, and Electrical Systems
- Structural Integrity
- Pest Control
- Technology Infrastructure
- Insurance
- Furniture and Equipment
- Accessibility
- Landscaping and Sidewalks
- Parking lot maintenance including snow removal
- Needed improvements/upgrades

Remodeling and New Builds

Remodeling an existing library building or taking on a new building construction project can be the most exciting, yet daunting task a library board, director, and staff will undertake. Months, perhaps even years of planning will be required before the first hammer falls. Whether remodeling or building, many of the planning pieces overlap.

Perhaps there was a bond issue that passed in a local election, or the governing body and library have been planning and fundraising for a major remodel or new library for years. When the time comes, it is imperative that library staff and the board of trustees have constant input and communication with contractors and others involved in the process.

Here are some items to consider:

- Hire an architect that is familiar with library spaces
- Be involved in the hiring of a contractor. Make sure they are willing to listen to professional library consultants, library staff, and others who know libraries
- Consult the library strategic plan and have conversations with governing officials on what the community needs the library to look like in the future
- Consult with librarians from other libraries that have recently undergone a building or remodeling project
- Prioritize technology infrastructure
- Carefully document the building process and details that will be helpful to future library directors, board members, and governing officials

Importance of Library Building Consultants

Library boards and staff may not have sufficient expertise to deal with all of the pieces of a building remodel or new build. Working with an outside library consultant can help provide guidance in many areas including:

- Square footage needs
- Library space arrangements
- Current and future technology needs
- Cost estimation
- Project management support

Design considerations for safe, welcoming, and sustainable spaces

Beyond the aesthetics, it is essential to prioritize functionality, accessibility, and long-term sustainability when designing a new library space. Some considerations include:

- Proper compliance with accessibility requirements
- Adequate space for library staff to complete work
- A private office for the director

- Efficient and appropriate layout, for example: a separate entrance for meeting rooms to be accessed when the library is closed for public service, quiet reading areas located at a distance from children's areas, arranging spaces to take advantage of natural lighting
- Adequate storage, number of outlets, and wiring, with consideration for the future.
- Durable carpets
- Furnishings that are durable and easy to clean, as well as moveable
- Adequate sight lines and lighting
- Adequate space for children's programs, kitchen spaces, individual meeting rooms
- Adequate safety and security considerations if people need to exit the building quickly or shelter in place

Combo Libraries

School and public library collaboration as a combo library in one building has been a practice in some South Dakota communities for many years. Although the missions, functions, and operations of both types of libraries differ in some areas, they overlap in others. Beyond the collaborative activities of two separate entities, a combination of services into one facility is a possibility with careful planning and commitment. Combination libraries often ensure stronger, better financed and staffed services for patrons of all ages.

Combination or joint-use libraries are a model communities under the population of 1,000 may consider if they have a nearby school. However, this model can also be successful in large communities. Currently South Dakota has 23 combination libraries across the state. A list can be found at School/Public Combination Libraries.

This information is designed as a guide for communities interested in learning more about the necessary steps in forming a school/public combination library. The State Library is here to assist any community considering this option.

Building considerations for school-public combo libraries

Public parking and entrance
If the library is part of a school building, it will need to be located where the public library patrons can access it directly from an outside parking lot. This will encourage adult usage of the library during the day and reduce distractions during instruction.

Separate and shared spaces
Clearly delineate separate spaces for school and public library functions such as areas for classroom activities and public library reading spaces. Identify shared or multifunctional spaces and design flexible spaces that can accommodate diverse activities such as meeting rooms, group study areas, and makerspaces.

Library collections
Plan for separate sections for school-specific materials and public library resources.

Security measures
Build in security measures that serve both school and public library settings. This may include surveillance systems, controlled access points, and emergency response plans.

Community spaces
Design welcoming and comfortable spaces for public library users that encourage the community to visit for purposes beyond book borrowing.

Resources

SD Codified Laws relating to combo libraries:
School libraries operate under the local governance of the school district. State statute for the formation of a joint usage library does exist. It is recommended that communities considering a public/school combo library contact the State Librarian to discuss.

SDCL 14-2-38

School/Public Combination Libraries

ALA Library Buildings & Space Planning

Public Library Space Needs Planning Outline - from the Wisconsin Department of Public Instruction

Resources for Space Planning in Libraries - from WebJunction

Chapter 14: Library Technology

Having a technology plan for your library is critical for receiving technology-related funding and keeping your library's technology up to date. A plan will provide a clear roadmap for current upkeep and future growth for the library.

A public library should have a constantly evolving plan to incorporate library technology into the library's service programs, provide public use computers and equipment, and provide current technology and equipment for staff to do their work efficiently. A library technology plan will be greatly affected by the size of the library and its financial resources, but it should answer the following questions:

- How many computer workstations does the library need?
- Does the library have an up-to-date plan specifying the software packages that should be available to the library staff to make the library operations more efficient and effective?
- Does the library have a technology management plan that handles timely backups, storage of master software copies and an inventory of library hardware and software?
- Does the library have appropriate Internet access for both staff and public use? Is the library's Internet service provider proving reliable?
- If the library has an integrated library automation system, is there a written plan for its maintenance and update?
- If the library does not have an integrated library automation system, does it plan to purchase one within the next few years? If not, does the library have a statement specifying the reasons why such a system is not appropriate or feasible?
- Does the library have a fiscal plan to finance the automation that should be implemented within the next three years?
- Have the library staff and board consulted with the staff at the State Library for ideas on what the library should plan for over the next 3-5 years?
- Does the library provide time and opportunities for library staff training to keep up with and advance technology skills?
- Does the library have access to professional IT staff who understand the unique needs of the library?

Online Services

Libraries should take note of online services available for subscriptions or purchase to enhance current or future library resources and services. Examples could include:

- OPAC (Online Public Access Catalog) library systems
- Ebook collections
- Online newspapers,
- Virtual reference services
- Digital archives

- Library apps that support online program registration
- Online event calendars
- Digital storytimes
- Online book clubs

The SD State Library provides a suite of electronic resources at no cost to residents of South Dakota: Complete List of Electronic Resources

Chapter 15: Trustee Continuing Education

Education of board members must not cease after orientation. A requirement of library accreditation through the SD State Library is that board members must complete a certain number of continuing education (CE) hours every three years. Board members should be aware of new trends and new methods in the library field. To stay informed, members should become active in the South Dakota Library Association (SDLA), read selected professional publications, and take advantage of training and webinars shared on the SD State Library training page.

There are ways of keeping current through participation in statewide and regional workshops and conferences. Visiting other libraries is yet another way to keep current, especially if the library to be visited has a successful project which can be examined.

Library Accreditation and Staff Certification Programs

The purpose of the voluntary certification and accreditation programs for public libraries and library staff in South Dakota is to encourage the ongoing development of quality library service in the state.

Voluntary Public Library Accreditation

Requirements for Library Boards

To qualify for accreditation, library boards are expected to accumulate a minimum of 15, 30, or 45 hours (depending on accreditation level) within the three years leading up to the application. Here are some general guidelines regarding the CE requirements:

- No one board member can obtain all required hours.
- Online CE: For Enhanced and Exemplary levels limits apply to how many CE hours may be earned online. Online coursework must be preapproved by the SDSL accreditation committee.
- Libraries are responsible for keeping an accurate record of their collective board CE participation.

Libraries applying for accreditation are asked to evaluate services in the following categories:

- Governance
- Administration
- Access
- Collections and Resources
- Funding
- Staffing
- Technology
- Public Relations

Trustees should use this list for guidance when deciding which training opportunities may be appropriate for earning continuing education hours. Library boards should aim to cover a broad range of library-specific topics.

South Dakota Voluntary Library Staff Certification Program

In addition to their own continuing education, the board should encourage and support the continuing education of all library staff members. Adequate funding for staff members to travel to workshops and other training programs should be provided in the budget.

The State Library oversees a voluntary certification program to recognize public library directors and library staff who pursue continuing education opportunities.

The goals of the certification program are to help library directors and staff acquire, maintain, and develop skills through continuing education to provide better library service to their communities.

Through this program, the State Library recognizes public library directors and staff who update their knowledge and skills on a continuing basis. Having a certified director is one of the Essential Standards for South Dakota public libraries, under the SDSL's library accreditation program.

An individual's certification is valid for three (3) years. To renew at the same level requires 30 contact hours of continuing education during that 3-year period.

Resources

South Dakota Voluntary Public Library Accreditation Program

South Dakota Voluntary Library Staff Certification Program

Chapter 16: Board Self-Evaluation

Library boards should take time every year to formally evaluate board performance. Periodic self-evaluations ensure the board's effectiveness, identify areas for improvement, and align their activities with the library's mission and community needs. Successful boards pay attention to communication, relationships, and hold themselves accountable for smart decision making. The purpose of a board evaluation exercise is not to find fault with individuals, but instead to identify strengths and areas for improvement. A board evaluation should be followed with a plan to improve.

Boards should ask these questions:

- Is the board functioning effectively as a group?
- Does the board have a clear understanding of its trust and responsibilities?
- Does the board stay out of the administration of the library, yet consult with the director on how well the library is doing?
- Does the board meet frequently, with the benefit of agenda, detailed minutes, and appropriate reports sent in advance of the meeting?
- Do individual trustees have good attendance records?
- Does the board have a good relationship with the library director? Does the director concur with the board assessment of this partnership?
- Has the board done everything possible to make sure the library can have an excellent staff? Are compensation and benefits competitive, policies clear, continuing education supported, and staff expertise respected?
- Do trustees accept assignments on behalf of the library?
- Has the library board acted effectively to cope with problems, handle challenges, and take advantage of opportunities?
- Have the director and library board been successful in gaining effective financial support for the library?
- Does the library have an annually updated plan and an annually reviewed policy manual?
- Are the trustees visible in the community as advocates for excellent library service?
- Are the trustees aware of current issues facing South Dakota public libraries?
- Are the trustees visible in South Dakota state government as advocates for excellent library service?
- Do the trustees attend workshops and conferences to enhance their skills and knowledge as library board members?

Library boards can use self-assessment surveys and discussions and invite external facilitators to perform self-evaluation. Here are some examples of library board self-assessment forms.

Public Library District Board Self-Evaluation

Board Self-Evaluation Questionnaire

Surrey Public Library Board Self-Evaluation

Board Profile Worksheet

Glossary of Library Terms for Non-Librarians

501(c)3 status
501(c)3 is a section of the Internal Revenue Code that identifies an organization as a charitable, tax exempt organization. Having a library foundation or Friends group with 501(c)(3) status can enhance a library's eligibility for various grants and funding opportunities and allows donors to claim a tax deduction for charitable contributions.

American Library Association (ALA)
The ALA represents librarians, trustees and interested citizens in the United States and Canada. The American Library Trustee Association is a division of ALA specifically organized for the purpose of discussing and handling problems which library trustees may encounter.

Americans with Disabilities Act
Civil rights legislation that makes it illegal to discriminate against people with physical, mental, or emotional disabilities.

Bylaws
Bylaws refer to the regulations and rules established by an organization for internal management and often determine the rights and obligations of members of the organization. They provide a framework for the operation and management of an organization.

CIPA
This is a law that was established in 2000 and helps to protect minors from obscene content and abuse on the Internet, among other things. To receive E-rate funding, you must certify that your institution is in compliance with this law.

Collections / Special collections
A library collection is made up of all the physical and electronic items that have been curated with a specific audience or purpose in mind. Special collections can include rare books, genealogy materials, archives, local history, theses, and books from local authors.

Combo libraries
Usually refers to a library jointly shared between a school district and a city or county governing body. School and public library collaboration as a combo library in one building has been a practice in some South Dakota communities for many years. There are state statutes for the formation of joint usage libraries.

Databases
Databases are searchable indexes of published, reliable resources such as research materials from academic journals, newspapers, and magazines.

E-content
Digital content that is accessible via a computer network such as the Internet.

Electronic Resources
Electronic resources (or e-resources) are materials in digital format accessible electronically. Examples of e-resources are e-books, electronic journals, and online databases.

E-rate
The commonly used name for the Schools and Libraries Program of the Universal Service Fund, which is administered by the Universal Service Administrative Company (USAC) under the direction of the Federal Communications Commission (FCC). The program provides discounts to assist schools and libraries in the United States to obtain affordable telecommunications and Internet access.

Friends of the Library groups
Friends of the Library groups are non-profit, charitable groups formed to support libraries in their communities. Friends groups often organize small fundraising events and assist with library programs and other events.

Governing body
The commission, council, or other elected body which governs a local governmental unit. For SD public libraries the governing body is the governmental unit (municipality, county, etc.) under which the library is legally established.

Institute of Museum and Library Services (IMLS)
The Institute of Museum and Library Services is a federal government agency that exists to advance, support, and empower America's museums, libraries, and related organizations through grantmaking, research, and policy development.

Integrated Library System (ILS)
A software used to manage and automate various library functions and operations. It serves as a comprehensive platform for organizing, cataloging, circulating, and maintaining library resources. May also be referred to as a Library Management System (LMS)

Intellectual freedom
The First and Fourth Amendments to the U.S. Constitution are integral to American librarianship. They are the basis of the concept librarians call intellectual freedom. Intellectual freedom accords to all library users the right to seek and receive information on all subjects from all points of view without restriction and without having the subject of one's interest examined or scrutinized by others.

Interlibrary Loan (ILL)
As defined by the Interlibrary Loan Code for the United States, "Interlibrary loan is the process by which a library requests material from, or supplies material to, another library. The purpose of interlibrary loan as defined by this code is to obtain, upon request of a library user, material not available in the user's local library."

Library Services and Technology Act (LSTA)
The Library Services and Technology act is a means of national funding for public library development and other related programs administered by the Institute of Museum and Library Services (IMLS). The Grants

to States program, awarded by IMLS to state library administrative agencies, is the largest source of federal funding support for library services in the U.S.

Library Foundation groups
A library foundation is a separate legal entity from a library friends group formed for the purpose of enhancing and expanding library programs and services. A primary function is to secure financial and in-kind donations for programs, services, collections, and capital projects.

Mountain Plains Library Association (MPLA)
MPLA is made up of the following member states: South Dakota, Arizona, Colorado, Kansas, Montana, Nebraska, Nevada, North Dakota, Oklahoma, Utah and Wyoming. MPLA's most important activities are the sharing of ideas and expertise throughout the area and the provision of opportunities for continuing education.

Online Public Access Catalog (OPAC)
An electronic database available to the public that provides bibliographic information about the books and materials in a library. This typically replaces a card catalog.

Open Meetings Laws
Also known as Sunshine Laws, these are statutes that require certain meetings of government agencies and bodies to be open to the public. These laws aim to promote transparency, accountability, and citizen participation in government decision-making processes.

SDCL
South Dakota Codified Laws are the collection of statutes and regulations under which the state of SD operates. The full list of current statutes is found at SD Legislature Codified Laws. Historical codified laws can be found in the SD State Library Digital Collections database.

South Dakota Library Association (SDLA)
SDLA is an 'at home' opportunity for the trustee to share ideas and knowledge with other South Dakota trustees and librarians. The association sponsors an annual conference and publishes Bookmarks, a monthly newsletter. Trustees may join the Public Library Section.

South Dakota State Library (SDSL)
The State Library is in existence to provide library service to all South Dakotans, largely through assistance to local public libraries. The State Library is open 8 am – 5 pm (CST) Monday – Friday. 1-800-423-6665 or 773-3131.

Strategic Plan
A library strategic (or long-range) plan is a formal, board-approved document that serves to document the library's goals over a 3-5 year timeframe, and how the library plans to meet those goals.