
Role of the Public Library Trustee

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ABSTRACT

THIS ARTICLE EXAMINES THE functions, roles, and responsibilities of the public library trustee in a rural setting. It reviews the basic responsibilities of the library trustee to ensure that the rural library serves the information needs of the community. The author emphasizes the important role the library trustee serves in determining policy, encouraging partnerships with other libraries and community organizations, and ensuring sufficient funding for the library to meet community information needs.

INTRODUCTION

The public library trustee in America is a unique governmental position that is unlike any other citizen governing group position. The library board does not have the same function as a city council, park and recreation board, police review commission, school district board, or a historical society, but it does share some of the same responsibilities, such as building ownership, fund-raising, governance, budgeting, and public relations. The governmental functions of library boards of trustees vary widely from state to state, within states, from county to county and within counties, and from municipality to municipality, but there is a commonality that is distinct to the provision of public library service. Basically, the library board of trustees is an appointed group of citizens to whom the governance of programs and services of the public library are entrusted on behalf of the general public by local government. The public library trustee represents the library to the community and the community to the library.

The trustee is the citizen representative responsible for providing the best possible library service to the community from which the board is appointed or, in a few communities, elected. The basic functions of the rural library trustee in many ways are not that different from the trustee of a large urban library. Both rural and urban trustees are responsible for governance, policy, community and public relations, budgeting, and leadership.

In addition, the rural trustee has responsibilities and functions not usually common to the board member of a large city library or affluent suburban county library system. These can include running the library for the librarian when the entire staff participates in a continuing education function or helping with story hour during a sudden overflow of kids. Often in a small library, the board members are the library's most useful volunteers.

Rural library trustees have the advantage over their urban colleagues in terms of relationships to the community and local funding authorities. In almost all small communities, the trustees personally know elected and appointed government officials, and in fact, they are often related. Since the majority of trustees have usually already been viable community leaders, they will have been serving side by side with the other community leaders on PTAs, church committees, volunteer fire departments, and all of the other boards and committees that make small towns function. This existing extraordinary community relationship makes it easier for the rural trustee to make a case for an adequate operating budget or for a one-time capital budget for a new building or library automation program.

Even in the smallest library, it must be remembered that the library board represents overall citizen's control of the library, whereas the librarian is responsible for carrying out the administration and technical work.

BASIC DUTIES

The paramount responsibilities of the rural library trustee are as follows:

- *The library trustee meets the needs of the people served by the library.*
- *There are important legal and budgeting functions, but basically the reason library boards exist is to make sure that the library serves the information needs of the community.* The basis of every board decision should always be how that decision helps serve the people of the community better.
- *The library trustee sets policies that guide the library.* The primary function of the board is to develop policies that ensure that the library is run effectively, legally, and economically. These policies

concerning personnel, material selection, and public use regulations set the standard for the librarian who implements the policies and manages the library by them.

- *The library trustee develops a plan of library service outlining the long-range goals for the library's growth and development.* Goals should be projected two to ten years into the future. By planning for at least two years, the board formulates long-range plans that will guide the librarian's short-term administration over the next twelve to eighteen months.
- *The library trustee ensures that the library is financed adequately, and that the budget is being spent responsibly.* As the board sets policies and develops long-range plans, it needs to assess the ability of the library, and its funding body, to finance the plans. The board also needs to be sure that there are enough real dollars in the treasury to cover ongoing costs. However, despite the fact that the trustees are responsible for ensuring that funds are well spent, it does not mean that every little expenditure must be approved. The trustee should determine that the money is spent to deliver the library programs and services authorized in the annual budget by relying on financial and performance audits.
- *The library trustee supports the librarian's management of the daily operations of the library.* This is one of the most basic responsibilities of the library board. The board's role is to select and hire the very best person for the job and then provide the direction that it wants the library to take. When the board has given informed direction to that librarian, the librarian must be allowed to manage. To be sure of the direction the library is taking, the board must establish a mechanism for periodic evaluation of the librarian and of the library and its services.

TRUSTEE QUALIFICATIONS

Anyone appointed to a library board is potentially qualified to be outstanding as a library trustee. However, no trustee is ever perfectly qualified to master all of the duties of the board when appointed for the first time.

Every person appointed to the board brings personal strengths, experiences, and talents that will serve the library. A prospective board member should feel an informed and sincere interest for public library service. Trustees who are pressured to join the board without an interest in libraries, reading, or the provision of information may never be strong supporters. On the other hand, persons appointed to the board just because they "love to read" often get bored with the details of local government and budgeting problems.

Board members should be selected for the special talents that they can contribute. Expert knowledge in banking, computers, or the governmental process is valuable for specific projects. Attorneys, accountants, contractors, and others with expertise are useful to the board provided their advice is free, appropriate, and rooted in a sincere concern for excellent library service.

The broad spectrum of community interests, geographic areas, jobs, and ethnic backgrounds should be represented on the board. In a small town, care must be taken to avoid over-representation by any single political, religious, or community group such as Kiwanis or the Women's Club. This is often difficult in a rural area because of the smaller pool of available library supporters, but a board consisting of diverse viewpoints is very important in assuring that the library will serve the total community.

Potential and new trustees need to know that service on a library board will take their time and their energy and possibly their financial support if a building project looms in the future. Boards need members who will actively advocate for the tax revenue funds needed to fulfill the information needs of their community. They must be willing to seek funding in competition with roads, sewers, ditches, fire protection, and other local government concerns.

While the librarian should not be directly involved in the selection of board members, an alert librarian can supply names of likely candidates from the community for consideration. Although qualified individuals make up the board, collectively the board will have its own personality. Desirable board characteristics include political savvy; occupational mix; varied personal interests; business management skills; optimism; and diversity in age, gender, and ethnic background.

BOARD POLICYMAKING

The role of policymaking is perhaps the biggest component of a rural library trustee's job and is often the most confusing. Just "who does what" is often the problem, particularly in the small library. Board members, and librarians for that matter, are not sure which decisions are policy and which are considered management. A simplistic but useful guide is that usually policy decisions are those that affect the library as a whole and management decisions affect individual programs, services, or people.

Understanding the role of the rural public librarian will help library board members understand their policymaking function. The librarian must organize the internal service structure of the library and develop procedures which best utilize this structure. A board member might not like the placement of a bulletin board or location of a new books display,

but these are management decisions. The librarian should be in charge of hiring, firing, evaluating, and disciplining all staff members. The board, on the other hand, is only responsible for one employee: the librarian.

The supervision of staff, and the relationship of individual board members to the staff, can cause some very vexing situations in the small library. Often board members in rural communities will have had long friendships with individual staff members through churches, school functions, and just plain "growing up together." Board members need to step back and let the librarian and the board's personnel committee work the "people" situations out. This can be especially difficult when one of the library's users or someone on the city council asks a board member to intervene in a personnel problem.

Carefully wrought personnel policies defining job descriptions, salary structures, grievance procedures, and benefits are very important responsibilities of the board. Staff supervision, personnel management, and policy implementation are duties of the librarian.

A competent librarian motivates staff, giving them direction and ensures two-way communication. Board members are leaders of the whole library structure, not leaders of the staff. The librarian inspires, directs, and leads the staff, and the board directs and leads through the librarian.

The library board sets and approves the annual budget, but the librarian makes the day-to-day decisions about how the budgeted money is spent. It is tempting for board members, particularly when they see something is not quite right, to jump in and try to control what goes on. The most important principle for board members to learn is to stand back and give the librarian the opportunity to run the library. The major part of the librarian's job is often one of day-to-day and short-term duties. The role of the board member is to develop a road map of library policies over a long span of time.

While the librarian is responsible for administering personnel policy, some board and staff interaction is desirable. Staff attendance at board meetings, including a brief presentation by individual staff members as to what they do in their daily work, will give trustees a better understanding of library functions. Board recognition of individual employees for outstanding work can be very beneficial for morale. Formal recognition for years of service, for successful special project completion, or for new ideas, is always appreciated by staff members.

All libraries, even the smallest one or two person operation, should have an up-to-date board-approved policy manual readily available for staff, board members, local officials, and the general public. The easiest way to prepare a policy manual is to borrow other libraries' manuals from the state library and compare these with policies already established by

the board. The kinds of specific policies are as varied as the many different aspects of library service; local needs and situations will determine the contents and details of an individual library's policies.

Elizabeth Kingseed (1988), former assistant state librarian, New Hampshire State Library, has developed a very useful seven-page "Guidelines for a Library Policy," which is included in Virginia G. Young's (1988) also very useful book *The Library Trustee: A Practical Guidebook*.

PARTNERSHIPS

Partnering is equally as important a task for the rural library trustee as policy development. The rural library is the chief information source for its community and cannot stand by itself isolated from all other available information resources.

The role of the small public library as an access point to the vast world of information is proving to be one of its most important roles. The exploding development of online databases, Internet services, online catalog networks, electronic reference sources, and interactive multimedia CD-ROMS is not limited to use in large city libraries. The demand for this new world of information must be met by small rural libraries at a time when many are struggling to keep up with the demand for current best-sellers in book format.

According to the 1991 U.S. Congress Office of Technology Assessment report (1991):

how well rural areas cope with their economic problems depends not only on their present situation and resources but also on future developments and events. There are three major trends that will likely affect rural communities:

1. the shift to an information-based economy and the enhanced role of communication and information as a strategic weapon in business;
2. the emergence of a global economy and hence the growing need to compete on a worldwide basis; and
3. a growing concern about the environment and the environmental costs of economic development.

These trends are eroding the boundaries of rural communities, making these communities more dependent on external events.
(p. 45)

Representative David Minge, from Minnesota's second congressional district, testified before a House Technology, Environment and Aviation Committee in July 1994 on why rural America must be part of the "information highway."

He pointed out that President Eisenhower's vision in the 1950s of an America connected by superhighways led to the building of our interstate highway system. Almost a century before, America experienced great rural growth after building another transportation system: railroads.

As the new American highway system is developed—called the information superhighway—rural people should be concerned. Minge said that rural America cannot afford to have the ramps to the information highway closed, nor can it afford to be road kill. The congressman illustrated several uses for information technology in a rural setting:

Farmers with similar problems could quickly share solutions; Up-to-the-minute weather and market reports could be accessed from home whenever a farmer needed information; Rural doctors could quickly receive a second opinion by transmitting an x-ray to a specialist in an urban area; A rural school district could offer more topics by hooking a class into a fiber-optic network and receiving an interactive broadcast of a similar class being held thousands of miles away. (“Rural Areas...,” 1994, p. 3)

Finally, Minge concluded that, as a nation, we all will benefit when everyone has access to this system, and everyone can be reached through this system, just like mail delivery or telephone service. “We cannot afford to penalize those who live in rural areas,” he said. “Those without access to the information highway will not have access to the 21st Century” (“Rural Areas...,” 1994, p. 3).

The rural library trustee needs to ensure that the library must also be a traveler on Minge’s superhighway, or they might not have access to the twenty-first century. Just a short time ago, even after most of Eisenhower’s superhighways were built, libraries were pretty much as they always had been for the past sixty or seventy years or more.

The State Library of Iowa recently asked librarians and trustees throughout the state to contemplate the role of libraries in the Information Age and to address the question about the accessibility of information for all Iowa citizens. They developed a vision for the library of the future that outlined new functions for the delivery of information:

Current library practice is changing dramatically. For example, libraries have concentrated on enlarging collections of locally owned materials. Now, the emphasis will shift from *ownership* to *access* for lesser used items or time/date sensitive information.

Connected libraries will:

- Provide gateway services by linking customers, in person and electronically, to the electronic highway;
- Host information by supporting electronic information files as well as providing links to external information sources;
- Publish electronic information through the creation and maintenance of unique files of local information;
- Serve as consultants, constantly shifting and rapidly increasing the array of information available. (State Library of Iowa, 1994, p. 3)

Partnering with other libraries and information resources in a large geographic area while retaining local support and governance has always been a delicate balancing act for the small public library. Because of the

unique governance structure of library boards, libraries are able to engage in more cooperation and partnership ventures beyond their municipal and county boundaries than any other local government entities.

Police and fire departments often provide mutual assistance to surrounding communities, but they do not globally share resources as do local public libraries. No other municipal or county departments have the capacity to be tied together in such an efficient and cost-effective variety of local, regional, state, and national networks as rural libraries.

Many rural library board members find that their function as a trustee includes service far beyond their small town library. In addition to their local board, they may also be board members of county and regional library networks with meetings entailing a journey of 100-mile round trips to represent their community interests in new partnerships.

The autonomy and policymaking prerogatives of the local boards may be sorely tried when cooperative resource sharing requires collective policies or when an electronic online network requires substantial local funding for a computer mainframe located fifty miles away.

Another form of library partnering is the development and encouragement of a Friends of the Library group. Friends can be seen as the community outreach arm of the library, assisting the board in community and public relations. Friends can support the policies of the library board and can play a major role in explaining and integrating policy.

The ideal library partnership is that trustees set policy, the librarian carries it out, and the Friends support it. Volunteers are extremely important in small libraries, but occasionally conflict arises between volunteers and part-time staff members. A formal volunteer program under the umbrella of an organized Friends group can eliminate most of the turf problems in the rural library setting.

The single most important partnering for the trustee is the partnership between the library board and the librarian. The backbone of this very basic partnering is communication—discussing issues and exchanging information. The time during the board meeting when the librarian's report is delivered can be the springboard for discussion, evaluation, and exchange of ideas between the librarian and the board and among individual board members.

THE TRUSTEE AS PLANNER AND BUILDER

A rural library board dependent upon a parsimonious city council for financial nourishment or dependent upon a county or regional network for automation of operational functions may feel that long-range planning is a futile exercise. For that library, or any other library, not to do planning is similar to driving cross country without a road map. The board may accidentally get where it wants to go, but the journey may be time consuming, expensive, and filled with potholes.

The elementary first step in the planning process is to decide what kind of library the community should have. A library board's prime objective should be to define the mission of the library in order to meet the information desires and needs of the community and to evaluate the effectiveness of the library in fulfilling that mission.

There are many useful books and guidelines that will help the library board, but the following are among the most practical:

Planning and Role Setting for Public Libraries: A Manual of Options and Procedures by Charles R. McClure;

Output Measures for Public Libraries by Nancy A. Van House et al.;

"What's Good?": *Describing Your Public Library's Effectiveness* by Thomas A. Childers and Nancy A. Van House; and

Managing Change: A How-To-Do-It Manual for Planning, Implementing and Evaluating Change in Libraries by Susan C. Curzon.

People may live in a small town all their lives and never know some of the interesting basic facts about the community. Many citizens—possibly a library trustee, the town's clerk, or even the mayor—may not know the town's elevation, the percentage of people with a high school or college education, number of people below the poverty level, or the number of people over the age of sixty-five. They may not be aware that, for example, 63 percent of the population has a library card or 23 percent use a neighboring town's library, or half of the users rate the book collection as "fair."

Trying to plan without collecting information about the community and the library is like drawing that road map without naming the towns. The board may be pursuing a direction without knowing where they are when they get there. The information required for library planning includes locating the demographic data about the town from census reports of several years; finding state and regional planning agency reports; doing an evaluation of the library's current performance; and surveying residents, library users, and staff.

After the needs of the people served by the library are determined, the board and staff together must decide on the operations and services required to fill the needs. They must figure out the cost of the plans and determine where the funding will come from.

At this point, for some reason, after much hard work, many long-range plans end up on a shelf forgotten. It is incumbent on the board, in partnership with local officials, professional planners, and community leaders, to develop an action plan for implementation of the library's full road map to the future.

Long-range planning for services and operations should be undertaken for a period of at least two to ten years in the future. In planning for a new updated or remodeled library building, the board should look

at space needs for the next twenty years. The library board has a fundamental responsibility to the community to provide an adequate facility for the delivery of information services.

The small town library board members will find that the building development process will be the most exciting, frustrating, harrowing, and rewarding experience of their trustee tenure. Swan (1992) summarizes the library building process as follows:

1. Involve the entire community as much as possible.
2. Develop a plan based on community needs.
3. Hire professionals to do what they do best—planning, fundraising, and architecture. Do not be afraid to pay for their services—they are worth it.
4. Get realistic cost estimates—then add 10 percent.
5. Communicate! Communicate! Communicate! Let everyone know what you are doing as often as you can and in as many ways as you can.
6. Coordinate the efforts of various groups. Do not let one group keep the others in the dark.
7. Share the credit or, better yet, give it to others. It will make you look good.

FINANCE AND THE TRUSTEE

The most important financial role for the rural library trustee is not worrying about copying machine cost overruns but making sure that the library is adequately funded to serve community needs. The board is responsible for ensuring that the library is getting a fair share of available tax revenue from its funding authority.

The city or county providing the tax support for library service will have an annual timetable and procedure for submitting requests for funding of local government operations. The library board should review this timetable process at its first meeting of the new fiscal year and begin developing a strategy for obtaining reasonable support for its operations.

Adequate local government funding usually follows good performance, perceived needs, and “squeaky wheels.” Policy development, long-range planning, an appreciated service structure, reliable budgeting, accurate facts and figures, and a notable presentation by trustees will help convince local government officials that the library is as deserving of funds as a new animal control vehicle or updated fire hoses.

In addition to the trustees’ responsibility in lobbying with local government to adequately fund the small library, they should also keep the library’s programs and needs before the general public and seek out sources of local giving. Fund-raising, beyond the support from tax revenue, is an important aspect of membership on any nonprofit board. The board should periodically consider and approve a fund-raising rationale and plan a “case statement.” This is a written statement documenting the purpose and need of the fund-raising. This case is built upon the library’s mission statement and long-range plans. The case should clearly answer the questions of why the organization needs money and how it will be used.

Seymour (1988) suggests that the "case statement" for fund-raising should "aim high, provide perspective, arouse a sense of history and continuity, convey a feeling of importance, relevance, and urgency, and have whatever stuff is needed to warm the heart and stir the mind" (p. 43).

The library board embarking on fund-raising ventures should remember to partner with the librarian and the Friends of the Library. Fund-raising is often the primary function of Friends groups and sometimes it is only the Friends, not the library board, that can legally raise money through sales.

PUBLIC AND COMMUNITY RELATIONS

The small public library, without a planned public relations program, may often have a higher per capita circulation than a large library with a public relations specialist on staff. So why would the rural library trustee support an organized public relations effort when, for the moment, the library is well used?

The most important reason is that promotion of the library to the public as the community's most important information provider will become more and more difficult as society travels further down the information superhighway. Many other information resources, such as extension services, cable TV, bookstore chains, Internet, commercial databases, video stores, and for-profit information agencies will be competing for patrons' attention and money.

The complacent small town library relying on high circulation figures derived from best-sellers and picture books will not exist successfully in the twenty-first century. The library public relations (PR) program, like all other library programs, must be carefully researched and planned. The research should involve learning the nature of the community served by the library and finding out community attitudes toward the library. Open communication with all local news media sources is essential.

The role of the trustee in public relations is to develop planning tools, to formulate public relations policies, and to be a very loud advocate of the library. Ongoing dialogue with community members is essential so that the board can respond to community and individual concerns and needs. At the same time, board members need to let the public know about the good things their library is accomplishing. Often in budget development during tight times, the library board eliminates public relations line items as nonessential. If the public does not learn why the library is important and useful to them, the library itself will become the nonessential item.

EVALUATION

Every year the rural library board needs to stand back from its usual preoccupation and reflect on how the board is meeting its responsibilities. A good time to do this is at the beginning of the year after the

statistics from the previous year have been gathered and as the budget process gets underway. Planning is a continuous process and boards must assess and evaluate the progress of the plans that have been crafted for the library.

Young (1988) provides excellent examples of trustee evaluation score cards—one developed by the Missouri State Library and the other by the Allen Parish Library in Louisiana. They are different and could be used by the board in alternate years (p. 197). The most useful tool for evaluating the librarian is *Evaluating the Library Director* (Bolt, 1983), a publication of the American Library Trustee Association.

In addition to evaluating itself—and the librarian, of course—the board should also undertake output measures of the library. Output measures will allow the trustee to learn how useful and beneficial the library is to the community. These measure use, effectiveness, and extensiveness of services. Output measures include circulation per capita, library visits per capita, registered borrowers as a percentage of population, reference fill rate, and stock turnover rate. The American Library Association has published several easy-to-use guides for implementing output measures, and most state library agencies will have these and other useful planning tools for loan.

Although library boards function as smoothly operating teams most of the time, there are some occasions when “problem” trustees disrupt the teamwork. The “problem” board member can be loudly domineering or the opposite—a person who has not spoken since introducing themselves at the first meeting two years ago. Even if the “problem” trustee is just a veteran member who should have retired, the board should have policies and procedures for removing the unproductive member.

For a board to be creative, articulate, and dynamic, its individuals need to have creative, articulate, and dynamic qualities. A clearly written rotation policy should be added to the board's bylaws to weed out past-their-prime veterans when their terms expire. However, waiting for the domineering member's term of service to end may take several agonizing years.

The board, after going through its evaluation process, could set objectives for individual members. At the end of the year, the board committee officers would then evaluate each member against these goals. Trustees not meeting the board goals can be asked to resign. This is a straightforward objective procedure that is based on standards all members have helped to formulate.

CONCLUSION

Of course, there are many other responsibilities and challenges for board members of rural libraries—assuring compliance with local, state, and federal laws; actively participating in regional continuing education

workshops and library conferences; joining state library associations; and keeping abreast of current library trends by regularly reading at least one library periodical are just a few.

There is a wealth of informative material available for rural library board members to use in their quest to provide the absolute best library service to their communities. The American Library Association in general, the Public Library Association, and the American Library Trustee Association have published dozens of appropriate books and pamphlets suitable for assisting board members in meeting the challenges of modern library information services. The American Library Association, unlike most professional membership associations, welcomes, and actively encourages, the participation and full membership of its trustees.

Almost every state library agency has published a public library trustees handbook of one kind or another in cooperation with their state library association's trustee association. A trustee's own state's handbook is the very first library document that should be read by a rural library board member. Two particularly noteworthy state titles are the Nebraska Library Commission's *Nebraska Trustees Handbook* (Robertson, 1990) and the Colorado State Library's *Leadership for Colorado Libraries: The Role of Trustees* (Bolt, 1985).

The books listed as references at the end of this article each have useful bibliographies leading to many more titles on the topics of libraries and trustees. The American Library Association, in addition to printed materials, has several videos suitable for rural trustees including the sixteen minute *Library Trustees: Meeting the Challenge* (ALA, 1988) which visually covers most of the subjects discussed in this article.

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