



CALL TO ORDER
ROLL CALL
PUBLIC COMMENT
APPROVAL/CORRECTION(S) TO MINUTES
APPROVAL/ADJUSTMENTS TO THE AGENDA
CORRESPONDENCE

DIRECTOR'S REPORT

The director updates the Board on monthly use measures, financials, administration projects, library services and activities.

UNFINISHED BUSINESS

- A) FY 2024-25 Library Budget - Review
Discussion and review of the proposed budget for FY 24-25.

NEW BUSINESS

- B) Library Trustee Manual – Section Review
Review of Chapter 11: Friends of the Library
- C) Long-Range Planning
Discussion on prioritizing planning efforts for 2024-25

ANNOUNCEMENTS

ADJOURNMENT

The City of Escanaba will provide all necessary, reasonable aids and services, such as signers for the hearing impaired and audiotapes of printed materials being considered at the meeting to individuals with disabilities at the meeting/hearing upon five days notice to the City of Escanaba. Individuals with disabilities requiring auxiliary aids or services should contact the City of Escanaba by writing or calling at (906) 786-9402.

Respectfully Submitted,

Carolyn Stacey, Library Director

Mission Statement

The Escanaba Public Library connects people through information, opportunities and ideas to inspire lifelong enrichment and enjoyment.

**CITY OF ESCANABA
LIBRARY BOARD OF TRUSTEES
MINUTES
FEBRUARY 26, 2024**

A meeting of the Escanaba Public Library Board of Trustees was held on February 26, 2024 at 5:00 p.m. in the City Council chambers. The meeting was called to order at 5:00p.m.

PRESENT: Lynn Soderberg, Priscilla Green, Christina Economopoulos, Amy Reddinger, Carolyn Stacey

ABSENT: Gail Brazeau, Tyler Dubord

PUBLIC COMMENT: None

APPROVAL/CORRECTIONS(S) TO MINUTES: The minutes of the December 18, 2023 meeting were accepted on consensus.

APPROVAL/ADJUSTMENTS TO THE AGENDA: The agenda was accepted as printed on consensus.

DIRECTOR'S REPORT: Financials, use measures, programs, outreach, professional development, and regional / community activities were reviewed.

UNFINISHED BUSINESS:

NEW BUSINESS:

A) Contracts for Library Service – Approval

Trustees reviewed and discussed the final draft of the tiered library services contract, sample cover letter and supporting materials. *P. Green made a motion to approve the contract, C. Economopoulos seconded, motion carried.*

B) FY 2024-25 Library Budget – Review

The library director reviewed the budget narrative, revenue and expenditure line item descriptions and a copy of the submitted budget request. FY 2024-25 is expected to be a transition year, with the move to tiered contracts. No General Fund reduction is proposed at this time, although it is still possible between now and the budget hearing, scheduled for April 9th. Trustees will have another opportunity to comment on the budget at the March board meeting.

C) User Agreement – Library of Things

Trustees received information and procedures for the library's circulating collection of objects, including costs and fees for damaged or stolen items. Trustees agreed on consensus to include additional language referencing legal consequences for violations.

D) Trustee Training Opportunities

The library director shared copies of the slides from a webinar from the Library of Michigan entitled "Michigan Library Trustee 101." The director will view the webinar and select relevant sections for potential viewing at upcoming meetings. Trustees will also continue the practice of reviewing a section from the Michigan Library Trustees Manual at each meeting.

ANNOUNCEMENTS: The next meeting is scheduled for Monday, March 25th at 5:00 p.m.

ADJOURNMENT: The meeting was adjourned at 6:00p.m. on consensus.

Respectfully Submitted,

Carolyn Stacey, Library Director

Approved,

Lynn Soderberg, Chair

Fund 271 - LIBRARY FUND
 Period Ending 02/29/2024
 YTD BALANCE 02/29/2024
 MONTH 02/29/2024
 ACTIVITY FOR INCREASE (DECREASE)

GL NUMBER	DESCRIPTION	AMENDED BUDGET	NORMAL (ABNORMAL)	INCREASE (DECREASE)	NORMAL (ABNORMAL)	AVAILABLE BALANCE	% BDT USED
Fund 271 - LIBRARY FUND							
Revenues							
Dept 000							
271-000-566-100	ST OF MICHIGAN LIBRARY FUNDING	25,074.00	0.00	0.00	25,074.00	0.00	
271-000-656-000	ORDINANCE/PENAL FINES-CO ALLO	83,299.00	0.00	0.00	83,299.00	0.00	
271-000-657-000	FINES AND FEES	22,422.00	9,183.61	888.90	13,238.39	40.96	
271-000-675-000	CONTRIB FROM PRIVATE SOURCES	0.00	2,463.31	0.00	(2,463.31)	100.00	
271-000-675-001	CONTRIBUTIONS-FRIENDS	4,931.00	3,756.51	0.00	1,174.49	76.18	
271-000-675-002	CONTRIBUTIONS- COMMUNITY FUND	0.00	116.15	0.00	(116.15)	100.00	
271-000-677-212	SUPERIORLAND	750.00	1,195.00	0.00	(445.00)	159.33	
271-000-677-221	LIB OF MI FOUNDATION BOOK TOUR	0.00	100.00	0.00	(100.00)	100.00	
271-000-699-101	CONTRIBUTION FR GENERAL FUND	461,325.00	461,185.00	0.00	140.00	99.97	
Total Dept 000		597,801.00	477,999.58	1,005.05	119,801.42	79.96	
TOTAL REVENUES							
597,801.00		477,999.58	1,005.05	119,801.42	79.96		
Expenditures							
Dept 000							
271-000-702-000	SALARIES AND WAGES	296,110.00	165,334.31	22,010.69	130,775.69	55.84	
271-000-703-000	SICK, HOLIDAY, VACATION	0.00	29,455.74	1,927.35	(29,455.74)	100.00	
271-000-711-000	OVERTIME	0.00	154.19	0.00	(154.19)	100.00	
271-000-712-000	OVERHEAD ON SALARIES & WAGES	90,625.00	58,312.04	3,838.82	32,312.96	64.34	
271-000-713-000	LIFE & HOSPITAL INSURANCE	71,010.00	47,283.79	5,358.42	23,726.21	66.59	
271-000-726-000	SUPPLIES-MISCELLANEOUS	500.00	659.78	0.00	(159.78)	131.96	
271-000-727-000	OFFICE SUPPLIES	3,500.00	2,694.24	27.75	805.76	76.98	
271-000-791-000	BOOKS, MAGAZINES, PERIODICALS	20,000.00	14,220.20	2,573.54	5,779.80	71.10	
271-000-801-000	PROFESSIONAL SERVICES	36,206.00	18,509.40	0.00	17,696.60	51.12	
271-000-850-000	TELEPHONES	2,154.00	1,806.55	250.70	347.45	83.87	
271-000-850-005	TELEPHONES - BOOKMOBILE	0.00	2,765.63	693.21	(2,765.63)	100.00	
271-000-910-000	INSURANCE AND BONDS	300.00	375.41	0.00	(75.41)	125.14	
271-000-932-000	REPAIRS/MAINT TO EQUIPMENT	0.00	587.41	0.00	(587.41)	100.00	
271-000-942-000	RENTAL OF BUILDING OR OFFICES	51,996.00	34,664.00	4,333.00	17,332.00	66.67	
271-000-943-000	RENTAL OF EQUIPMENT	4,931.00	0.00	0.00	4,931.00	0.00	
271-000-943-005	EQUIPMENT RENTAL - BOOKMOBILE	0.00	900.00	0.00	(900.00)	100.00	
271-000-958-000	MEMBERSHIP AND DUES	425.00	436.00	200.00	(11.00)	102.59	
271-000-977-000	CAPITAL OUTLAY-EQUIPMENT	1,600.00	0.00	0.00	1,600.00	0.00	
Total Dept 000		579,357.00	378,158.69	41,213.48	201,198.31	65.27	
TOTAL EXPENDITURES							
579,357.00		378,158.69	41,213.48	201,198.31	65.27		
Fund 271 - LIBRARY FUND:							
TOTAL REVENUES							
597,801.00		477,999.58	1,005.05	119,801.42	79.96		
TOTAL EXPENDITURES							
579,357.00		378,158.69	41,213.48	201,198.31	65.27		
NET OF REVENUES & EXPENDITURES							
18,444.00		99,840.89	(40,208.43)	(81,396.89)	541.32		
TOTAL REVENUES - ALL FUNDS							
600,801.00		477,999.58	1,005.05	122,801.42	79.56		
TOTAL EXPENDITURES - ALL FUNDS							
599,357.00		382,110.46	41,589.22	217,246.54	63.75		

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 02/29/2024 (ABNORMAL)	ACTIVITY FOR MONTH 02/29/2024 INCREASE (DECREASE)	AVAILABLE BALANCE (ABNORMAL)	% BDC USED
NET OF REVENUES & EXPENDITURES		1,444.00	95,889.12	(40,584.17)	(94,445.12)	6,640.52

REVENUE AND EXPENDITURE REPORT FOR CITY OF ESCANABA
 PERIOD ENDING 02/29/2024

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 02/29/2024 NORMAL (ABNORMAL)	ACTIVITY FOR MONTH 02/29/2024 INCREASE (DECREASE)	AVAILABLE BALANCE NORMAL (ABNORMAL)	% BDT USED
Fund 236 - BEZOLD TRUST FUND						
Revenues						
Dept 000						
236-000-665-000	INTEREST EARNINGS	3,000.00	0.00	0.00	3,000.00	0.00
Total Dept 000		3,000.00	0.00	0.00	3,000.00	0.00
TOTAL REVENUES		3,000.00	0.00	0.00	3,000.00	0.00
Expenditures						
Dept 000						
236-000-791-000	BOOKS, MAGAZINES, PERIODICALS	10,000.00	3,456.77	375.74	6,543.23	34.57
236-000-801-000	PROFESSIONAL SERVICES	10,000.00	495.00	0.00	9,505.00	4.95
Total Dept 000		20,000.00	3,951.77	375.74	16,048.23	19.76
TOTAL EXPENDITURES		20,000.00	3,951.77	375.74	16,048.23	19.76
Fund 236 - BEZOLD TRUST FUND:						
TOTAL REVENUES		3,000.00	0.00	0.00	3,000.00	0.00
TOTAL EXPENDITURES		20,000.00	3,951.77	375.74	16,048.23	19.76
NET OF REVENUES & EXPENDITURES		(17,000.00)	(3,951.77)	(375.74)	(13,048.23)	23.25

Monthly Traffic By Hour



Month by Hour for
For the month of February, 2024

Day	Hour Ending												Total					
	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm		9pm	10pm	11pm	12am	oth
1	2	4	22	19	16	25	10	10	6	4	9	0	0	0	0	0	3	130
2	2	3	24	26	27	22	23	11	18	0	0	0	0	0	0	0	4	160
3	0	5	17	27	16	21	9	0	0	0	0	0	0	0	0	0	1	96
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	4	6	38	25	22	28	31	20	24	0	0	0	0	0	0	0	8	206
6	1	6	29	25	14	17	16	24	9	9	3	0	0	0	0	0	5	158
7	2	14	30	22	22	26	24	19	19	5	3	2	0	0	0	0	4	192
8	2	1	25	24	19	27	19	15	5	6	4	0	0	0	0	0	3	150
9	6	1	26	25	24	17	24	13	7	0	0	0	0	0	0	0	0	143
10	0	1	19	17	43	27	14	0	0	0	0	0	0	0	0	0	3	124
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	1	16	29	22	25	38	25	15	7	0	0	0	0	0	0	0	3	181
13	0	3	30	21	17	20	15	19	15	4	8	0	0	0	0	0	6	158
14	1	18	34	21	27	27	28	24	21	4	5	0	0	0	0	0	9	219
15	4	5	23	12	2	7	15	10	13	5	2	0	0	0	0	0	2	100
16	2	8	28	25	14	19	12	22	17	0	0	0	0	0	0	0	4	151
17	1	1	19	15	13	13	23	1	0	0	0	0	0	0	0	0	1	87
18	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	2	4	39	28	26	32	27	31	18	7	7	0	0	0	0	0	6	227
21	1	15	28	29	20	27	38	8	13	15	15	0	0	0	0	0	6	215
22	6	8	23	21	28	25	34	16	15	14	5	0	0	0	0	0	1	196
23	2	4	21	21	23	18	13	12	9	0	0	0	0	0	0	0	3	126
24	2	0	21	19	12	21	10	4	0	0	0	0	0	0	0	0	1	90
25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	2	13	36	36	30	30	24	19	11	3	2	0	0	0	0	0	5	211
27	4	4	21	26	20	19	21	20	15	11	8	3	0	0	0	0	4	176
28	3	10	20	14	16	27	17	24	9	13	4	0	0	0	0	0	4	161
29	2	3	25	22	18	22	16	20	15	4	4	0	0	0	0	0	1	152

**Month by Hour for
For the month of February, 2024**

Day	Hour Ending												oth	Total					
	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm			9pm	10pm	11pm	12am	
Total	52	153	627	542	494	555	489	357	266	104	79	5	0	0	0	0	87	3,810	
Hour by Day of Week																			
Sun	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Mon	7	35	103	83	77	96	80	54	42	3	2	0	0	0	0	0	0	16	598
Tue	7	17	119	100	77	88	79	94	57	31	26	3	0	0	0	0	0	21	719
Wed	7	57	112	86	85	107	107	75	62	37	27	2	0	0	0	0	0	23	787
Thu	16	21	118	98	83	106	94	71	54	33	24	0	0	0	0	0	0	10	728
Fri	12	16	99	97	88	76	72	58	51	0	0	0	0	0	0	0	0	11	580
Sat	3	7	76	78	84	82	56	5	0	0	0	0	0	0	0	0	0	6	397
All Total	52	153	627	542	494	555	489	357	266	104	79	5	0	0	0	0	87	3,810	
Grand Total Hour by Day of Week																			
Sun	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Mon	7	35	103	83	77	96	80	54	42	3	2	0	0	0	0	0	0	16	598
Tue	7	17	119	100	77	88	79	94	57	31	26	3	0	0	0	0	0	21	719
Wed	7	57	112	86	85	107	107	75	62	37	27	2	0	0	0	0	0	23	787
Thu	16	21	118	98	83	106	94	71	54	33	24	0	0	0	0	0	0	10	728
Fri	12	16	99	97	88	76	72	58	51	0	0	0	0	0	0	0	0	11	580
Sat	3	7	76	78	84	82	56	5	0	0	0	0	0	0	0	0	0	6	397

0001 Front Door

CITY OF ESCANABA
2024-2025 BUDGET REQUEST WORKPAPERS
LIBRARY FUND

GL NUMBER	DESCRIPTION	2021-22 ACTIVITY	2022-23 ACTIVITY	2023-24 PROJECTED ACTIVITY	2023-24 AMENDED BUDGET	2024-25 REQUESTED BUDGET	2024-25 RECOMMENDED BUDGET	2024-25 APPROVED BUDGET	2024-25 RECOMMENDED AMT CHANGE	2024-25 RECOMMENDED % CHANGE
REVENUES										
271-000-528-000	FEDERAL REVENUE	88,979	165,813	5,354	0	0	0	0	0	0.00
271-000-566-100	ST OF MICHIGAN LIBRARY FUNDING	25,044	25,841	25,659	25,074	25,659	25,659	0	585	2.33
271-000-569-200	STATE OF MICHIGAN - GRANT	220	0	0	0	0	0	0	0	0.00
271-000-656-000	ORDINANCE/PENAL FINES-CO ALLO	73,785	74,023	80,207	83,299	83,000	83,000	0	(299)	(0.36)
271-000-657-000	FINES AND FEES	7,251	13,152	13,392	22,422	29,260	29,260	0	6,838	30.50
271-000-669-000	GAIN ON SALE OF INVESTMENTS	(3,622)	0	0	0	0	0	0	0	0.00
271-000-672-000	SALE OF PROPERTY	96	0	0	0	0	0	0	0	0.00
271-000-675-000	CONTRIB FROM PRIVATE SOURCES	50	99	2,463	0	0	0	0	0	0.00
271-000-675-001	CONTRIBUTIONS-FRIENDS	10,324	13,137	12,063	4,931	4,846	4,846	0	(85)	(1.72)
271-000-675-002	CONTRIBUTIONS- COMMUNITY FUND	0	534	0	0	2,000	2,000	0	2,000	0.00
271-000-677-212	SUPERIORLAND	700	182	1,195	750	750	750	0	0	0.00
271-000-677-221	LIB OF MI FOUNDATION BOOK TOUR	0	0	100	0	0	0	0	0	0.00
271-000-699-101	CONTRIBUTION FR GENERAL FUND	450,000	450,000	461,235	461,325	450,000	425,000	0	(36,325)	(7.87)
TOTAL REVENUES		652,827	742,781	601,668	597,801	595,515	570,515	0	(27,286)	(4.56)

CITY OF ESCANABA
2024-2025 BUDGET REQUEST WORKPAPERS
LIBRARY FUND

GL NUMBER	DESCRIPTION	2021-22 ACTIVITY	2022-23 ACTIVITY	2023-24 PROJECTED ACTIVITY	2023-24 AMENDED BUDGET	2024-25 REQUESTED BUDGET	2024-25 RECOMMENDED BUDGET	2024-25 APPROVED BUDGET	2024-25 RECOMMENDED AMT CHANGE	2024-25 RECOMMENDED % CHANGE
EXPENDITURES										
271-000-702-000	SALARIES AND WAGES	252,195	272,157	296,110	296,110	322,126	300,270	0	4,160	1.40
271-000-702-100	SALARIES AND WAGES - BOOKMOBILE	287	714	0	0	0	0	0	0	0.00
271-000-703-000	SICK, HOLIDAY, VACATION	42,927	46,842	0	0	0	0	0	0	0.00
271-000-712-000	OVERHEAD ON SALARIES & WAGES	115,631	130,078	90,625	90,625	94,105	86,300	0	(4,325)	(4.77)
271-000-713-000	LIFE & HOSPITAL INSURANCE	64,555	68,627	71,000	71,010	75,245	58,625	0	(12,385)	(17.44)
271-000-726-000	SUPPLIES-MISCELLANEOUS	1,068	878	625	500	500	500	0	0	0.00
271-000-726-001	SUPPLIES - LEGO CLUB	0	368	0	0	0	0	0	0	0.00
271-000-727-000	OFFICE SUPPLIES	3,763	5,601	3,600	3,500	3,500	3,500	0	0	0.00
271-000-791-000	BOOKS, MAGAZINES, PERIODICALS	21,326	22,727	22,000	20,000	20,000	20,000	0	0	0.00
271-000-801-000	PROFESSIONAL SERVICES	36,988	33,653	35,721	36,206	35,726	35,726	0	(480)	(1.33)
271-000-850-000	TELEPHONES	2,328	2,637	2,178	2,154	2,154	2,154	0	0	0.00
271-000-850-005	TELEPHONES - BOOKMOBILE	0	0	3,133	0	3,047	3,047	0	3,047	0.00
271-000-860-000	TRAVEL EXPENSES, AUTO ALLOW.	260	0	0	0	0	0	0	0	0.00
271-000-910-000	INSURANCE AND BONDS	375	242	375	300	400	400	0	100	33.33
271-000-932-000	REPAIRS/MAINT TO EQUIPMENT	0	143	0	0	0	0	0	0	0.00
271-000-942-000	RENTAL OF BUILDING OR OFFICES	51,996	51,996	51,996	51,996	51,996	51,996	0	0	0.00
271-000-943-000	RENTAL OF EQUIPMENT	779	2,850	0	4,931	0	0	0	(4,931)	(100.00)
271-000-943-005	EQUIPMENT RENTAL - BOOKMOBILE	0	450	1,800	0	1,800	1,800	0	1,800	0.00
271-000-958-000	MEMBERSHIP AND DUES	425	428	436	425	411	411	0	(14)	(3.29)
271-000-960-000	EDUCATION AND TRAINING	0	45	0	0	0	0	0	0	0.00
271-000-977-000	CAPITAL OUTLAY-EQUIPMENT	5,770	0	0	1,600	2,000	2,000	0	400	25.00
271-000-977-500	CAPITAL OUTLAY - BOOKMOBILE	60,983	142,299	0	0	0	0	0	0	0.00
TOTAL EXPENDITURES		661,656	782,735	579,599	579,357	613,010	566,729	0	(12,628)	(2.18)

NET OF REVENUES/EXPENDITURES - FUND 271		(8,829)	(39,954)	22,069	18,444	(17,495)	3,786	0	(14,658)	(79.47)
BEGINNING FUND BALANCE		44,173	35,343	(4,611)	(4,611)	17,458	17,458	0	0	0.00
ENDING FUND BALANCE		35,344	(4,611)	17,458	13,833	(37)	21,244	0	0	0.00

CHAPTER 11: FRIENDS OF THE LIBRARY

Many public libraries benefit from a volunteer non-profit group known as Friends of the Library. “The Friends,” as they are called, are library volunteers who typically focus on fundraising and volunteer projects on behalf of the library. Their unique status as a separate and independent organization that is devoted to the growth, development, and improvement of the library adds a lot of value to the library but can also present some unique concerns.

Friends groups are a valuable asset for a library. They use their influence to assist the board in obtaining desired financial support. Their financial support during a district library or millage campaign can be the key to a successful outcome.

Friends usually work to raise additional funds to augment a library’s budget. Organizing community book sales, offering special programs, and selling homegrown cookbooks are just three of the many ways Friends groups generate extra funds from their community. Many groups also have members that are trained in grant writing. Working with the library director, and the library board, Friends select areas of the library they wish to support with these supplemental funds. Final plans for the use of funds raised are often a collaboration between the friends, the director, and the board.

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.

It is important to note that Friends groups are not part of the library, and nor are they governed by the library. They are nonprofit corporations separate and independent from the library. 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. Many Friends groups are tax exempt 501(c)(3) entities. Libraries, too, may qualify for this status. See below, and [Appendix I](#) for more information.

Friends are typically comprised of patrons who are enthusiastic library supporters. They are motivated to promote the services of the library to the community. They serve as advocates for the library, working to influence public opinion and governmental action on behalf of the library on the local level. This advocacy is another distinction – and advantage – of a Friends group, since, as a government entity, libraries (including library boards and staffs) are precluded by law from officially participating in political advocacy (Library boards and staff can advocate as private citizens, but not as an organized group affiliated with the library).

Library trustees and library staff members can show their support by membership in the Friends of the Library. However, to avoid conflicts of interest, current trustees and staff may not hold office in the Friends of the Library organization. Doing so could violate state incompatible office statutes and jeopardize the Friends’ standing as a non-profit organization.

Sources on Friends’ groups, including information on starting and revitalizing a group can be found:

- **Friends of Michigan Libraries (FOML)**
<http://foml.org/>

- **United for Libraries**

UFL provides useful resources for Friends groups at www.ala.org/united. (NOTE – See [Appendix A](#) for information to login and access members only resources. The Library of Michigan provides a statewide membership for all Michigan public libraries.) The resources include toolkits such as “Starting a Friends Group or Revitalizing the One You Have” and “Friends and Libraries Working Effectively Together”.

- **American Library Association (Public Library Association) On Demand Webinar: “Friends and Foundations: What they do and how to make the most of them.”** <http://www.ala.org/pla/education/onlinelearning/webinars/ondemand/friends> (NOTE – There is a registration fee for this webinar).

A Word About Tax-Exempt Status (501(c)3 status):

Many public library Friends groups are 501(c)3 entities. This means that the group has applied and been approved by the Internal Revenue Service (IRS) as a charity. 501(c)3 is the Tax Code section under which the tax exemption is authorized. There are different types of tax-exempt designations. 501(c)3 status simply implies a particular type of charitable entity. This 501(c)3 designation permits donors to Friends groups to deduct the donation from income taxes (in accordance with the applicable laws on deductions). This designation also serves as a validation to foundations and other grant-making institutions that the 501(c)3 entity is a legitimate charity that has been verified by the IRS. Often, large grant making entities will only accept applications from 501(c)3 organizations. This does not mean, however, that if a Friends group is not a 501(c)3 entity, that it is not a valid charitable organization.

Incorporation as a non-profit in Michigan, and registration with the Attorney General under the Charitable Solicitation Act also provides a Friends group with a charitable identity. The main advantage many Friends groups see for 501(c)3 status is the access to grants. However, 501(c)3 status does come with a few restrictions on expenditures and annual filing requirements.

To obtain 501(c)3 status, a Friends group must apply via the IRS. The forms for application can be confusing and it is a good idea for Friends groups to invest in legal assistance for this process. An attorney can make the process much simpler and efficient. The IRS can be very picky, and they will return applications that are not correctly completed.

Below are some additional resources on gaining 501(c)3 status. It is a good idea for Friends groups considering tax-exempt status to review the advantages and disadvantages to this process and how this status will benefit the organization before making a decision. Consulting your accountant, auditor, and/or attorney is also recommended.

501(c)3 Resources for Friends Groups:

Michigan Non-Profit Corporation Requirements

https://www.michigan.gov/documents/lara/BCS_CD_269_08-15_527658_7.pdf
https://www.michigan.gov/lara/0,4601,7-154-61343_35413_35426---,00.html

Michigan Charitable Solicitation Requirements:

Administered by the Attorney General’s office:

<https://www.michigan.gov/ag/about/charitable-trust> (scroll to bottom of page)

Exemptions to registration:

<https://www.michigan.gov/ag/about/charitable-trust/charities/exemptions>

IRS 501(c)3 Information

Applying for tax-exempt status with the IRS:

<https://www.irs.gov/charities-non-profits/applying-for-tax-exempt-status>

Information on requirements for staying exempt (filing requirements, expenditure restrictions, etc.):

<https://www.stayexempt.irs.gov/>

Turning the Page

Build advocacy skills and confidence through *Turning the Page*! A fully customizable advocacy training curriculum is now available through *Turning the Page: Building Libraries, Strengthening Communities*.

Turning the Page: Supporting Libraries, Strengthening Communities



PLA is pleased to announce that the advocacy training curriculum *Turning the Page: Supporting Libraries, Strengthening Communities* continues to be available at www.PublicLibraryAdvocacy.org (<http://www.publiclibraryadvocacy.org>). This training curriculum is an updated version of *Turning the Page* that was developed for library associations and networks around the world, with input from the Public Library Association and other grantees of the Bill & Melinda Gates

Foundation's Global Libraries initiative.

Turning the Page: Supporting Libraries, Strengthening Communities is a complete training package that includes an Advocacy Training Implementation Guide—a recommended read before diving into the curriculum—and a set of 15 training sessions that each includes a trainer script, PowerPoint presentation, and handouts. An Advocacy Action Plan Workbook accompanies the training so participants can develop an advocacy plan for their library in real-time. All materials are free, and we hope you find them helpful. Anyone is welcome to download and use *Turning the Page: Supporting Libraries, Strengthening Communities* today; the curriculum and other resources are free to use and share!

If you are interested in a more formal training experience, several PLA-trained *Turning the Page* facilitators are available to help implement the content at your library ([/pla/leadership/advocacy/turningthepage/facilitators](http://pla/leadership/advocacy/turningthepage/facilitators)). All of these facilitators have extensive experience with the *Turning the Page* content and would bring a dynamic and successful advocacy program to your library.

While the content is free and downloadable, we ask that when using the materials, you include the following attribution: "This content has been adapted in [Current Year] by [Your Organization], based on the *Turning the Page* advocacy training curriculum developed by the Bill & Melinda Gates Foundation in 2014. The curriculum and its original materials can be found in English at www.PublicLibraryAdvocacy.org (<http://www.publiclibraryadvocacy.org>)." Also, please complete this short survey (<https://www.surveymonkey.com/s/LXZ69GM>) to tell us how you're using the curriculum.

The training sessions include:

1. Introduction

This session introduces participants to the *Turning the Page* training program and prepares them for the sessions to come. Focused more on the logistics of the training, this session will walk participants through the agenda for the advocacy training, the format of the sessions, and the supporting materials and tools they will be using. Participants will complete an advocacy self-assessment survey to identify the advocacy knowledge and skills they want to develop or strengthen during the training.

2. Value of the Public Library (Core)¹

This session focuses on building a foundation for the rest of the training by stressing the value of the public library and motivating participants to undertake advocacy on behalf of their libraries. This interactive session sets the tone for an engaging and successful training.

3. Defining Advocacy (Core)

Ensuring participants have a solid understanding of advocacy is absolutely critical to the success of the training. This session focuses on what advocacy is, why it is an important part of library work, and what advocacy could look like in a specific community. Trainers will highlight some key advocacy tactics and provide relatable examples of advocacy from the community or region.

4. Developing Your Advocacy Goal (Core)

The first step in developing an Advocacy Action Plan is for a participant to determine what he or she wants to achieve. Trainers will help participants define what an advocacy goal is, how best to develop an advocacy goal for their library, and how an advocacy goal can be used to develop a full advocacy plan. Trainers will help participants develop their own advocacy goals to use throughout the remainder of the training.

5. Identifying Target Audiences (Core)

An essential component of advocacy is knowing who the decision-makers are that advocates need to reach to achieve their library advocacy goal. During this session, trainers will lead participants in discussing the concept of a target audience and why it is important to identify one. Trainers will lead activities to help participants identify the right target audiences for their libraries.

6. Using Library Perception Information and Impact Data

Understanding people's perceptions of a library—what they think and feel about the library—will help the library plan and conduct an advocacy effort. Additionally, information about how libraries improve their communities—or

¹ "Core" sessions are deemed critical for any advocacy training. For more details, please see page 30.

"impact data"—can help further persuade and motivate audiences. In this session, trainers will help participants learn about library perception information and impact data, and discuss how they can use this information to support their library advocacy efforts.

7. Creating Library Advocacy Messages (Core)

Effective advocacy messages provide audiences with a clear understanding of a library's advocacy goal and how they can help the library reach its goal. During this session, trainers will review the elements that are needed to develop strong library advocacy messages, and then participants will practice developing their own messages that can support their library advocacy efforts.

8. Creating a Library Story

Everyone likes a good library story. In this session, trainers will lead a discussion about the elements of a good story, how to integrate both facts and examples into your story, and how different types of library stories will appeal to different audiences. Participants will practice turning information about their library into a compelling story.

9. Telling Your Library Story

Opportunities to talk about the library happen every day. It is important for library advocates to be ready to tell a short, compelling story about the impact a public library has and how it is valued by the community, to capture the attention and interest of their audience. In this session, participants will draft a short library story and practice telling it to their peers.

10. Effective Presentations

A successful presentation is a combination of interesting and relevant content and how it is presented. In this session, trainers will help participants explore their personal presentation style, discuss how to prepare for a presentation, personalize a short sample presentation, and practice delivering their sample presentation.

11. Media Planning and Outreach

Engaging traditional media—such as newspapers, radio, television, and related online news outlets—is an important tactic, but one in which advocates often lack confidence. In this session, trainers will review the key steps involved in traditional media outreach and tips for speaking with the media.

12. Social Media and Advocacy

Today, social media, such as Facebook, Twitter, and YouTube is as effective a library advocacy tool as traditional media. In this session, participants will

discuss the differences between traditional media and social media and review how social media can be used to reach your target audiences.

13. Making a Library Funding or Policy Request

All public libraries need adequate funding in order to meet both existing and anticipated community needs through library services, resources, and programs. In this session, trainers will lead a discussion on various types of funding and the steps to take to make funding requests, with a focus on the challenges, opportunities, and audiences that will influence the success of this effort.

14. Building and Sustaining Library Partnerships

Building strong partnerships takes time and commitment, but library partners can play an important role in helping to achieve participants' library advocacy goals. In this session, trainers will lead a discussion about the different types of partnerships, the key steps to take to build successful partnerships, and practical tips for sustaining partnerships for a library.

15. Putting Advocacy Plans into Practice

Once participants have developed their Advocacy Action Plan, keeping their plan on track is essential to advocacy success. In this session, trainers will lead a discussion on how to make an advocacy plan a reality and how to effectively build an advocacy team. Trainers will also help participants identify the first steps they will take to introduce and build support for their advocacy plan, and learn when and how to adjust and refine it.

CUSTOMIZATION

These 15 sessions provide a foundation on which to build an effective advocacy training for library staff and partners. They are written to be broadly applicable to as many situations as possible. You should work closely with trainers to customize the content and delivery to align with library organization and funding structures of your community or country, social norms and opportunities, and the knowledge and skill development needs of the training participants.

More information is available in the "Localizing and Customizing the Curriculum" section of this guide.

Learning about Libraries and Library Staff

"You must first understand the needs of the library community. We engaged a librarian and a professional trainer in our curriculum development from the beginning. We also piloted the training to determine what worked best, and found that we needed to make some adjustments to the training, including rearranging some topics and lengthening the training." (from the Poland Team's Advocacy Training Program)