

BOARD ACADEMY



This publication shares information of interest to public library boards. Links to the resources and full content can be found in the e-newsletter version.

WHAT'S GOING ON IN THE ECOSYSTEM?

MUNICIPAL BUDGETS

It's the time of year when local municipalities are developing and finalizing their budgets for 2025 (Most are in October). Are you prepared to make your ask?

Now is the time to tell your library's story. Just like you would in a fund drive letter, highlight your accomplishments in the community, especially ones that align with officials' stated goals and interests. The report should assure municipal funders that their funds and resources are well spent.

You should have a clear ask for support and a plan for the use of any requests. This could be monetary allocations or in-kind support like plowing the parking lot, mowing the lawn, or performing other maintenance on the municipality's time and funds. You can use the same Good/Bad/Possible framework PaLA uses in their ASK documents - show how their support has helped, describe what the needs are, and tell them what their funding will make possible in the upcoming year.

Tips for Success

- Don't let this be the only time you interact with local officials. Touch base throughout the year and support their initiatives where you can.
- Know your audience - what is most important to them? What struggles are they facing?
- Be authoritative - can they trust what you are telling them about the community?
- Don't reinvent the wheel - use the resources you already have. Does your ILS already generate nice infographic reports? Office of Commonwealth Libraries just released new reports that easily compile annual report data (see below). Put your time into building relationships, not creating fancy infographics that funders may not read.
- Review the Seven Principles for Persuasion and Influence described in the [Advocacy: Lessons Learned and Next Steps](#) handout (from Better Boards Better Communities-- Excerpt in handouts section; see email for link to 26-page document)

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WHAT'S GOING ON IN THE ECOSYSTEM? (CONT'D)

ANNUAL REPORTS

Did you know that there was more than one annual report for PA libraries? Different audiences require different reports to be completed annually.

- The State report to the Office of Commonwealth Libraries which libraries complete annually in the first quarter.
- The Annual Report to the Department of State which retains an organization's business status in Pennsylvania. This will begin in 2025. It replaces the decennial (10-year form) and will need to be completed each year. See one-pager in the handouts.
- The requirement for libraries to report to their municipalities annually (22 PA Code § 141.21(2)(i)(E))?

If your library hasn't done so already, now is a great time to work on the last example as municipalities work through their budgeting processes. The software company that the Office of Commonwealth Libraries uses to collect libraries' annual report data has released two more reports (pamphlet templates) to make fulfilling this standard much easier. The first is an infographic summary of all of your library's usage data; the other is an in-depth booklet of all of the summary information provided in the annual report.

Contact your library director for details on generating and saving the reports. They may also have templates or other tools which they use as needed.

Note: This tool through LibPAS was recently updated with training offered this week. If your director did not have a chance to attend, they can watch for the recording to be uploaded to PA Staff Academy or reach out to their district consultant for more information.

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Thank you to Warren Library Association for providing the examples! You can find the infographic example in the handouts section; contact us for the full report example.

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TIMELY TOPICS

LIBRARY BUDGET CONSIDERATIONS

As district consultants, we fully recognize the economic status (or economic distress) of the communities in our districts. Some are more affluent than others; some have better support from their local municipalities than others; and some are barely getting by on Pete the Cat's shoestrings. We do our best to share any information we can that may impact our libraries, especially information about laws, compliance, and the health of library staff and organizations. Ultimately, it is the responsibility of the library board to be aware of and abide by applicable laws and ensure that its organization has adequate funding to pay and retain quality staff and maintain operations. If your organization has any questions or want to chat about ideas, please reach out to your district consultant. We're happy to help!

Good budget projections take into account past experience, reasonable predictions for future circumstances, and a plan to achieve goals. Take a look at the budget versus actual expenditures over the last few years. What's the library's track record of accurate predictions? What adjustments could be made to improve targeting of projected income and expenses? Does your budget match your library's mission and goals proportionately?

Is your organization shortchanging the work done in order to fit into a budget that's two sizes too small? For example, are the salaries or wages paid in line with similar organizations in your region? Does your library have some savings to handle maintenance and repair of HVAC systems or staff computers? Is the library investing enough into services and collections to meet the needs of your community (not just the folks who regularly visit the library)?

Even surplus funds should have a purpose assigned to them. Is the library building up a cash flow reserve? Putting funds to work in investments? Saving for capital improvements? Don't let opportunities go to waste!



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TIMELY TOPICS (LIBRARY BUDGET: CONT'D)

INTERNAL AND EXTERNAL FACTORS TO CONSIDER

Salary-Exempt Threshold

The annual salary threshold to be exempt from overtime is (as of this publication) rising to a minimum of \$58,656 beginning January 1, 2025. Is your library prepared to raise the salary of currently exempt employees or to budget for/accommodate overtime payments? [NOTE: Paying overtime is a legal requirement for nonprofits and cannot be waived by an employee or paid in compensatory time off. If an employee incurs overtime it must be paid.]

Staffing Capacity

What kinds of questions has the board considered when discussing staffing lines in the budget? Has your library experienced growth in programs and services in 2024--like a booming summer program that kind of felt like old times? Does the library foresee needing more seasonal or permanent staff in 2025? Will there be staff changes like planned retirements or short-term absences? Can staff, especially library directors, leave the library (or at least the circulation desk) to attend meetings, trainings, and networking opportunities without having to close the library? Be aware of potential changes coming in future years, like minimum wage and library regulations, and begin planning how your library would maintain compliance.

PaLA 2025 and Other Training Opportunities

The 2025 Pennsylvania Library Association Conference is coming back to the Bayfront Convention Center in Erie, October 19-22, 2025. This is the closest it will get for most of our libraries - has your library considered the cost of sending staff for the training opportunities and networking benefits? Has your library budgeted for other training opportunities available throughout the year?

Incidental Expenses

Directors in particular are often required to travel as part of the job. Has your library budgeted to support that travel via staffing hours (their staffing hours as well as library coverage), mileage, or meal per diems?

Collection Development

Has your library budgeted enough to meet standards after calculating the remaining expenses? Quality Aid libraries will be required to spend at least \$4,176.46 on collection development. Independent libraries which receive Incentive for Excellence Aid must spend at least 12% of total expenditures (regardless of budgeted amount) on collection development by December 31. Federated systems must meet the 12% minimum as a collective with their member libraries, so be mindful of how your system expects your library to participate.

Facilities Maintenance

Has your director or maintenance personnel reported anything that could become a larger problem in the near future? Take a walk around the building--inside and out--to look for potential issues with windows, floors, ceilings, roofs, restrooms, kitchen areas or break rooms, weakened shelves or furniture, etc.

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SPOTLIGHT ON LEARNING

ELECTION TIME: WHAT LIBRARIES CAN'T (AND CAN!) DO

Q. We have an elected public official on our board and are a 501(c)(3), what do we need to be careful about?

A. Discussion at the board level needs to preclude any sort of promotion for that individual as a candidate. Outside of board meetings, individuals can promote the candidate but not mention the library's name. Also, the candidate cannot claim the library's support.



Q. Can we promote voter registration? What activities can libraries host or support to promote civic engagement?

A. The library should promote voter registration. The library must make sure there is no partisan support for a particular party. Libraries should provide information to assist voters (voting locations, information on all candidates, etc.). The library may wish to partner with the League of Women Voters. (Here's a [Permissible Election Activities checklist](#) from Nonprofit Vote.)

Q. Is asking for increased government funding for libraries lobbying or advocacy?

A. If it is matter of influencing legislation to get more funding, then it is lobbying. In PA, the state subsidy for libraries is a matter of legislation and thus lobbying. Library Services and Technology Act (LSTA) is a matter of influencing legislation at the federal level so also lobbying.

Q. What is the difference between advocacy and lobbying?

Advocacy is education and sharing information about your library and issues that impact. There is no call to action. Lobbying is attempting to influence legislation – either supporting it or opposing it. That is the federal definition. PA state definition of lobbying includes the federal definition and also includes influencing decision making of administrative staff, e.g., department heads or government staff. Lobbying includes meeting with legislators, phone calls, email correspondence, letters, messages to the community to support the library's lobbying efforts.

Q. Can 501(c)(3) libraries Lobby?

A. YES!!! And they should lobby. Lobbying for library support is permissible. They may NOT lobby for specific candidates or individuals in their role as library trustees. (*Working on political campaigns is allowable in a trustee's own time, but the trustee may not do so under the auspices of the library itself. In such instances, the trustee must note the trustee is NOT working on behalf of the library.)

Q. Can libraries that are departments of municipal governments lobby?

A. Check with your municipal authority if lobbying is allowable. In most cases, municipal policies prohibit department staff from lobbying. In some cases, libraries are both departments of municipal government and 501(c)(3) organizations. Again, check with your municipal authority.

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SPOTLIGHT ON LEARNING (CONT'D)

ELECTION TIME: WHAT LIBRARIES CAN'T (AND CAN!) DO

Q. How much is too much lobbying that it will endanger our tax-exempt status?

A. The IRS utilizes the “substantial” test, but the IRS does not define what qualifies as substantial. The IRS could arbitrarily say that 5% or 10% is substantial. Most nonprofits would not be spending that much on lobbying. There is an “expenditure” test where a nonprofit can choose the 501(h) election which allows up to 20% of gross expenditures on lobbying. There is no penalty for choosing a 501(h) election.

Q. What costs need to be captured in reporting on lobbying activity?

A. For 501(c)(3) libraries, report expenses that fit the federal definition of lobbying on Schedule C of the Form 990. Also, Part IV, line 4 should be checked “yes” that the library lobbies. Expenses include staff time, travel, printing, materials, etc. If the activity fits the PA definition of lobbying when it is influencing decision making of government administrative staff, those expenses do not need to be reported on the Form 990. Only expenses that fit the federal definition need to be reported on the Form 990, i.e., contact with legislators to support or oppose legislation.

Q. What can library staff or board members do to encourage support for libraries?

A. They can connect with the Pennsylvania Library Association and the Pennsylvania Citizens for Better Libraries who supply valuable information and talking points.

2025 VIRTUAL INSTITUTE FOR FRIENDS AND TRUSTEES

Save the Date!

2025 Library Friends & Trustees Institute

Pennsylvania Citizens for Better Libraries & the Pennsylvania Library Association will sponsor their second Virtual Institute for Library Friends & Trustees on Saturday, March 15, 2025. The sessions will be presented live & entirely online. This is an exciting opportunity for library Friends groups and library board members to learn and engage together. Anyone who is involved in library governance and operations, library fundraising or advocacy can benefit. Here are some comments from the 2024 Institute:

- *“Thank you all - this year’s Trustee Institute Invigorated and renewed my strength and zest for Libraries at a time when I desperately needed it!! Thank YOU!!!” - Connie C.*
- *“Totally worth it!” -anonymous*
- *“As a new Board member, I found the experience invaluable.” -Patricia E.*

March 15, 2025



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SNOE REGION

We've been hearing from board members that they would like to learn more about their role on the board, within the library, and library-related information from across the State. So, we're coming to you with a new publication: Board Academy. This will be distributed by e-mail about 4 times a year, with special editions to cover major breaking news. There will also be a PDF version available to print for distribution to other members of your board. While SNOE had previously put energy into the SNOEBall Advocacy e-newsletters, those resources will be converted to a webpage soon for on-demand access.

The SNOE Region is a cooperative initiative of the Seneca, New Castle, Oil Creek, and Erie & Crawford Library Districts to help develop and strengthen the libraries in Northwestern Pennsylvania.

This information is provided to the best of our knowledge as of the date provided. Information is subject to change without notice. While authoritative, it is not guaranteed for accuracy or legalities. If there are questions, please reach out to your district consultant, who may encourage your library to ask a local solicitor/lawyer for further guidance.

If you have any questions about this publication or previous editions' content, feel free to reach out to all of the SNOE Region's District Consultants at consultant@snoelibraries.org. If you have questions on any topics related to board governance, duties, advocacy, or libraries, please feel free to reach out to your library's District Consultant:

Leslie LaBarte, Seneca Library District: districtconsultant@senecadistrictlibraries.org

District Support, New Castle Library District: districtsupport@ncdlc.org

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