

THE PUBLIC LIBRARY FACTBOOK

Basic & Essential Information for Managing the _____

[Library Name]

MONTH & YEAR OF MOST RECENT UPDATE _____

DIRECTOR _____

BOARD PRESIDENT _____



COLORADO
Department of Education

Made possible through the [Institute of Museum and Library Services](#) (IMLS) administered by the [Colorado State Library](#).

This document was inspired by Chris Rippel and developed by the Public Library Leadership team, Library Development unit, of the Colorado State Library.

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INTRODUCTION

Purpose

This Public Library Factbook is designed for small and rural libraries to document the basic functions and logistics of their library. Why? With public library turnover rates of 15-20% in recent years, library leaders have expressed a need to consistently access library information for succession and emergency situations. This document serves as a template for each library and/or branch to inventory key library assets and protocols. It may come in handy in case of unforeseen events, changes in leadership, or for general reference to library infrastructure.

Organization

The Factbook is organized in alignment with the Colorado Library Standards which can be found at <https://www.ColoradoStateLibrary.org/standards/index>. As you fill out and use your Factbook, it can be a companion document to the Standards and other documents, such as the Colorado Library Consortium's New Director's Notebook (<https://www.clicweb.org/wp-content/uploads/2020/10/New-Director-Guide-V1-June-2020.pdf>). This guide includes links to resources to support you and your staff in the effective running of your public library.

How to Use

The Factbook is designed to provide quick access to all logistics of your library. While it includes a variety of information to fill in, this document may not be comprehensive because of local variations to library systems and logistics. So, while some items might not apply and you may need to add some sections, in the end, having thorough documentation is important. In addition, keeping it current and accurate is important; we recommend at least an annual review and revision. You may have an electronic version for quick updates and revisions. You may also print and date a copy to store in a secure yet accessible location.

Definitions

Public libraries are established and maintained according to the provisions of the Colorado Library Law (§24-90-101 et seq). The law outlines the Colorado State Library's responsibilities for providing services to libraries as well as the power to clarify library standards and definitions. You can access the Colorado definition of a public library at <https://www.ColoradoStateLibrary.org/standards/definition-public-library>. This definition is used to verify eligibility for state funding for libraries and other funding and services from the State Library. It is also used to determine which libraries provide statistical data in compliance with state and federal requirements.

In short, the Colorado State Library is charged with ensuring that all in Colorado have access to quality library services. To meet this goal, CSL staff engage with public library leaders to address the legal responsibilities, management and administration duties, public access and services offerings, and resource sharing opportunities in Colorado. In turn, your library receives funding, services, resources, and other assistance for the benefit of all in your community.

GOVERNANCE

Public libraries in Colorado are established by municipal or county governments or as library districts through a local election. Your Library Governing Authority adopts and provides oversight of the budget, supervises the library director, adopts policy, and sets strategic direction. The Library Governing Authority can be the library district governing board, city council, town or county manager, or other civic leadership. The Library Governing Authority is often referred to as the Library Board and the board members are Trustees. This document will refer to the Library Governing Authority as the Library Board. You can find information about the responsibilities of librarians and the Library Board at <http://www.ColoradoStateLibrary.org/librarydevelopment/publiclibraries/trusteehandbook>

Library Director

1. Where is the job description for the library director located?
2. Where is a copy of a complete set of the library's policies?
3. What is the schedule for the library board and library director to review and update the library's policies?
4. What is the library's mission statement, vision, and/or values?
5. Where can the library's strategic plan be found?
6. What is the URL of your library's website?
7. Who is responsible for keeping the website up to date?
8. Where can the library's disaster and/or emergency plan be found?
9. Where can documentation relating to the history of your library and establishing documents be found?

State law determines how many board members can serve and how long a board member can serve based on your legal basis.

<http://www.ColoradoStateLibrary.org/librarylaw/part1#24-90-108>

Library Board of Trustees

1. What are the names of all board members and when do their terms expire?

Board member name		Term expires
_____	President	_____
_____	Vice-President	_____
_____	Secretary	_____
_____	Treasurer	_____
_____		_____
_____		_____
_____		_____

2. How are new board members for your library appointed?
3. Where can Trustee's find the current copy of the library's policies?
4. Where are the Library Board By-Laws located? *(Please send a copy of the Board By-Laws to the State Library [mailto:morris_s@cde.state.co.us])*
5. When does the library board meet (i.e., week of the month, day of the month, time)?
6. What information does the board want in the library director's monthly report?
7. Where are the previous library monthly reports located? Where are past board minutes and treasurer's reports kept?

8. Is the library treasurer bonded?
9. Does the library and board have liability insurance?
10. What is the name and contact information for the liability insurance company?
11. Where is a copy of the insurance policy kept?
12. Does the library board evaluate the library director each year?
If so, what criteria do they use?
13. What constructive tips for working with the library board would you pass on to the new library director?
14. What is the orientation and ongoing training plan for boards and members of the board?

*Written rules
about Open
Meeting Laws and
the Sunshine Laws*

<https://leg.colorado.gov/sites/default/files/open-meeting-requirements-of-the-colorado-sunshine-law.pdf>

You can find information about Colorado library law at
<http://www.coloradostatelibrary.org/librarydevelopment/publiclibraries/index>

Calendar of Regular Events

*Items with an asterisk is for library districts only. See also

What	When	Who can help
Adopted budget and budget resolution filed with Dept. of Local Affairs.*	By Jan 31	Colorado Dept. of Local Affairs, Division of Local Government https://dlg.colorado.gov/budget-information-and-resources
Public Library Annual Report (PLAR) Reporting Period	Jan - March	Charissa Brammer (brammer_c@cde.state.co.us)
E-rate application	Jan - Feb	DeLilah Collins (collins_d@cde.state.co.us)
Check Out Colorado State Parks	Feb	Cristy Moran, Colorado State Library Adult Senior Services Consultant (moran_c@cde.state.co.us)
CLiC Virtual Winter Workshop	Feb	Colorado Library Consortium (https://www.clicweb.org/)
CAL Legislative Day at State Capitol	March	Colorado Association of Libraries Legislative Committee (https://cal-webs.org/Legislative_Committee)
Deadline to request exemption from audit.* (C.R.S 29-1-604(3))	March 31st	Contact the Local Government Audit Division, Office of the State Auditor, (303) 869-2800.
Colorado Resource Sharing Conference	Apr-May	Resource Sharing Conference Committee (https://ill.cvlisites.org/contact-us/)
Colorado Public Library Directors' Retreat	May-June	Kara Bauman, Director, Lyons Regional Library (kara@lyonsregionallibrary.com)
Summer Library Program Evaluation	August	Kate Brunner, Youth & Family Services Consultant (brunner_k@cde.state.co.us)

State grants	Sept	Melissa Carlson, Colorado State Library Program Assistant (carlson_m@cde.state.co.us)
Colorado Association of Libraries (CAL) Conference	Sept-Oct	Colorado Association of Libraries (https://cal-webs.org/)
Budget officer must submit proposed budget to the governing body.* (C.R.S. 29-1-105)	October 15th	Also, the governing body must publish "Notice of Budget" upon receiving proposed budget. (C.R.S. 29-1-106(1))
Colorado Libraries for Early Literacy (CLEL) Conference	Oct	Colorado Libraries for Early Literacy (https://www.clel.org/)
Youth Services Workshops	Oct-Nov	(https://www.cde.state.co.us/cdelib/librarydevelopment/youthservices/index)
Library board not levying a property tax must adopt the budget on or before this date.*	Dec 31st	

*For library districts: The Colorado Department of Local Affairs offers a more complete calendar of budget requirements <https://dlg.colorado.gov/budget-information-and-resources>

FINANCE

1. Where is a copy of your library's current budget?
2. If you are a Library District, who do you ask to find out the mill levy for the library as this will be used in your budget planning process?
3. If you are a City or County Library, who do you contact to determine the budget for your library?
4. What are the sources of the library's income and how much did each source provide last year?
5. Does the library apply for E-rate each year? If so, where are your E-rate files kept? (Erate resources are at <http://www.cde.state.co.us/edtech/erate>)

6. Name five organizations that have given grants to the library during the past 5 years.

7. Name five people who have given substantial money, time, donations, etc. to the library during the past 5 years.

8. Which bank(s) has/have the library's:

Checking account(s)? _____

Savings account(s)? _____

Capital improvement fund? _____

Investments? _____

9. Who writes checks for the library?
10. Who signs these checks?
11. Who handles payroll?
12. Who reconciles the monthly bank statements?
13. Who is responsible for financial reports?
14. Who audits the library's financial accounts?
15. What employee benefits do library staff members receive? Part-time, or full-time?
16. What is the contact for these benefits organizations? Where are the contracts for benefits?
17. Who can sign legal documents or enter into contracts for the library?
18. Is your library tax exempt? Is the library's Friend's group? What number(s) do you use?
19. What is the library's FEIN (Federal Employer Identification Number)? The FEIN allows businesses to file tax returns, apply for a business bank account, apply for a business loan, get certain permits or licenses, as well as reporting payroll, FICA, Social Security, and Medicare taxes. More info - <https://irs-taxnumber.org/>

FACILITIES

(Duplicate for each branch) (Consider using photographs and maps)

1. Where are all the light switches and main circuits?
2. Where is the thermostat?
3. Where are the heating and return vents?
4. Where are the fire extinguishers?
5. Where are the emergency exits?
6. Where are the breaker boxes/fuses?
7. Where is the water-heater?
8. Where is the main water shut-off? Who can shut it off?
9. Where are the library's flashlights kept?
10. Where are the emergency numbers kept?
11. Where do patrons go when the tornado-warning siren sounds?
12. Who has keys to the library?
13. Where are library keys stored? (Is there a backup set?)
14. Who cleans the library? How often? At a specific time?

15. Who is the building maintenance person?
16. Who changes light bulbs?
17. Who replaces toilet paper?
18. Who removes trash, sweeps, and vacuums the library?
19. Who unstops toilets?
20. Who mows the lawn?
21. Who removes snow from sidewalks and parking lots?
22. Who does the library's pest control?
23. Who is the library's property insurance with?
24. Where are the library's insurance policies?
25. Is the library insured for replacement costs or just the current worth of materials?
26. When was the last insurance inventory taken?
27. What are the worst problems with the current library building?
28. Does the library have a capital improvement plan? If so, where is it kept? How often is it reviewed or revised?

COLLECTIONS

1. Does the library have a materials selection policy?
2. How are items purchased for the collection? (Do you use certain vendors?)
3. Where are the back issues of magazines kept and for how many years back?
4. Does your library have microfilm? Has the library investigated digitizing?
5. If a patron asks for items to be removed from the collection, what is the policy and procedures for reconsidering items in the collection?
6. When was the last inventory of the collection?
7. When was the last time the collection was weeded? Where do the materials go after weeding?
8. Where is the shelf list?
9. When was the last EDI collections audit?
10. Do you charge fines for late materials? Who is responsible for overseeing the funds?
11. What are your policy and procedures for lost or damaged books? Do you have a collection agency? If so, what is the contact?

LIBRARY SERVICES & PROGRAMMING

1. What are your annual events and when do they occur?

Annual events	Date(s) of event	Person usually responsible
Summer Library Program	_____	_____
Story time	_____	_____
Winter celebrations	_____	_____
Fall celebrations	_____	_____
Book sale	_____	_____
Fundraiser	_____	_____
Other events	_____	_____

2. Who can get a library card?

3. What is needed to get a library card?

4. What actions are taken when items have not been returned by the due date?

5. What is done when items are returned late?

6. What is done when patrons claim items are lost?

7. What is done when patrons claim items have been returned, but the items can't be found in the library?

8. What is the URL (i.e., web address) for the patron side of the catalog? What is the URL, login and passwords for the staff administration of that catalog?

9. Who provides "cataloging records" for the library catalog?

10. Part of being a Public Library in Colorado as defined in the Library Standards (<https://www.cde.state.co.us/cdelib/standards/definition-public-library>) is to be a member and fully participate in the Colorado Libraries Collaborate (CLC) program. (<https://www.coloradovirtuallibrary.org/resource-sharing/clc/>).

What is the policy for out of district patrons checking out resources in your library?

11. Who handles interlibrary loans at the library?

12. What integrated library system do you use? Who is the contact for this software?

13. What other third-party services do you offer (i.e. databases, library of things)? Who are your contacts for these services?

COLORADO LIBRARY WORLD

State Librarian of Colorado-- Nicolle Davies

Colorado State Library
201 East Colfax Ave
Room 309
Denver, CO 80203
303-866-6900 (main)
Monday-Friday, 8 am - 5 pm

Organizations & Resources

Colorado State Library

<http://www.ColoradoStateLibrary.org>

Colorado Virtual Library -

<https://www.coloradovirtuallibrary.org/>

Colorado Library Consortium - <https://www.clicweb.org/>

Colorado Library Association (CAL) - <https://cal-webs.org/>

Marmot Library Network - <https://www.marmot.org/>

Programs and Services

Colorado Libraries Collaborate (CLC) - <https://www.coloradovirtuallibrary.org/resource-sharing/clc/>

This program allows Colorado library cardholders to borrow materials from any participating library in the state. For example, if you have a library card from Durango Public Library you can visit the Fort Lewis College Library and check out materials. The CLC program started because librarians in Colorado believe that residents should have the broadest possible access to library resources.

Colorado Historic Newspapers Collection (CHNC) -

<https://www.coloradohistoricnewspapers.org/>

CHNC currently includes more than 2 million digitized pages, representing more than 600 individual newspaper titles published in Colorado from 1859 up thru 2021. Ongoing support for maintaining and providing access to the CHNC is paid for with federal and state funds administered by the Colorado State Library. We continue to add new pages to the CHNC when community funding is secured to pay the costs of digitization.

Libraries Learn: Your Pathway to Learning - <https://www.librarieslearn.org/>

Sharing ideas and information is what libraries are all about, so the Colorado State Library created the Library Learning website to house the information, tutorials, webinars, and other resources you and your staff need. Hand selected courses and information to help you serve your patrons.

The Plains to Peaks Collective (PPC) - <https://ppc.cvlites.org/>

The Plains to Peaks Collective, our Digital Public Library of America (DPLA) Service Hub, is one way to share your unique digital collections with a wider audience.

Check Out Colorado State Parks -

<http://www.coloradostatelibrary.org/checkoutcostateparks>

Libraries across the state are offering two "Check out State Parks" passes, each for distribution with an activity backpack containing binoculars, brochures, and other educational

materials for their visit to state parks. Of those surveyed, 94% indicated that the program changed their view of libraries and 86% learned more about nature. Colorado libraries (public, academic, military) checked out backpacks nearly 7,700 times in 2019.

Colorado Talking Book Library (CTBL) - <https://myctbl.cde.state.co.us/>

The Colorado Talking Book Library supplies free audio, braille, and large print books to people who cannot read standard print, allowing them to connect to reading, stories, and adventure. CTBL serves 6,500 active individual patrons and 600 organizations, with service to people in every county in Colorado.

Growing Readers Together: Supporting Caregivers of Early Learners -

<https://www.cde.state.co.us/earlylearninglibraries/growingreaderstogether>

In Colorado, over 50% of children under six are in non-licensed care with family, friends, and neighbors. This early literacy grant helps public libraries, and their partners reach unlicensed, informal early childcare providers with ideas, resources, and encouragement for expanding early literacy with the children in their care. Funded, in part, by the Temple Hoyne Buell Foundation.

Library Tools & Guides

Colorado Library Law - <http://ColoradoStateLibrary.org/librarylaw/index>

Colorado Public Library Board & Trustee Handbook -

<http://ColoradoStateLibrary.org/librarydevelopment/publiclibraries/trusteehandbook>

Library Programming - What Every Library Board Member or Trustee Should Know About

Programming - <https://www.libraryprogramming.org/post/what-every-library-board-member-or-trustee-should-know-about-programming>

United for Libraries - <https://www.ala.org/united/>

United for Libraries - The Role of Library Trustees -

<http://www.ala.org/united/sites/ala.org.united/files/content/trusteezone/tipsheets/unitedts1.pdf>

United for Libraries - Tales from a New Trustee: What does a library Trustee do? -

<http://www.ala.org/united/sites/ala.org.united/files/content/trustees/talesnewtrustee/tfant4.pdf>

Urban Libraries Council - 5 Leadership Roles for Library Trustees -

https://www.urbanlibraries.org/assets/01_JanuaryExecutiveBrief.pdf

The Successful Library Trustee Handbook by Mary Y. Moore; Association for Library Trustees and Advocates Staff ISBN: 0838908918

The Complete Library Trustee Handbook by Sally Gardner Reed; Jillian Kalonick; Association of Library Trustees, Advocates, Friends and Foundations Staff (Contribution by) ISBN: 9781555706876

Diversity and Inclusion in Libraries by Shannon D. Jones (Editor); Beverly Murphy (Editor)
ISBN: 9781538114384

Collecting for Diversity, Equity, and Inclusion: Best Practices for Virginia Libraries by N. Carmack; 2021. *Virginia Libraries*, 65(1), p.5. DOI: <http://doi.org/10.21061/valib.v65i1.622>

CONTACTS

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For general information contact 303-866-6910