

A Strategy for Trusteeship

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We are all more or less aware that by definition a *trustee* is a person designated to act as governor or protector of property belonging to another. Since a public library belongs to its entire community, and since by North Carolina Laws most of your boards are advisory rather than truly governing or administrative bodies, I will speak to you today especially in your role as protectors and certainly as advocates of libraries. Despite shared desire and many common goals, it's important to know that our responsibilities differ—that they must be clearly defined and understood and that each must respect the turf of the other.

It is very simple to describe responsibility in the case of a truly governing or administrative board of trustees—

The trustees—establish the policies.

The librarians—carry out programs within these policies.

Where you are advisory, your role may be to make sure that policies have been established and that they are being followed.

Ideally, boards represent the library to the community as well as representing the community to the library. Don Earnshaw, a past president of the American Library Trustee Association gave us a clue as to *how* in one of his messages which he ended by saying, "We need people that will work with us. We all need help to perform our job of trusteeship. It must be '*we together*'."

If a trustee does not consider trusteeship to be an exciting challenge, if it is considered merely a boring custodial responsibility, my advice to that trustee is to *resign*, and the sooner, the better. BUT—assuming for the moment that there can be some real satisfaction in service as trustees, I'd like to review a kind of experience which many of us have known. The *place* might well be *your library*, and *here is the scenario*. "An innovative program has been suggested to meet an identified need—(It may have been the idea of a patron, a staff member or even a trustee.) It is given approval for development and fleshing out—After much staff study (possibly with outside assistance), a grant proposal is prepared—Again the board reviews the project and it is decided to request funding—dependent of course upon receipt of a matching grant—The proposal is submitted—Time passes —*The grant is approved*—The check arrives and implementation begins—The program succeeds—New patrons are reached or old ones are provided a new service—The result—*satisfaction for everyone concerned*—The *granting agency* is pleased because a grant aimed at innovation has achieved its purpose—*Patrons* on the receiving end have a new appreciation for "*their*" library—The *staff* is stimulated because this is what its members are in business for—The *town's fathers*' and the *public at large* have increased respect for an institution which continues to search out new ways of meeting needs—finally, the *board members* who have helped establish the climate in which all of the foregoing takes place can look back and say, "*That was the way to go!*"

Now, may I say that, if librarians will give your board basic information on programs, facilities, staff, and services, if they will involve trustees in establishing priorities for services, if they will use trustees in the process of maintaining communications with other community agencies regarding their information needs, and if they will continue to work through trustees in making funding and legislative needs known to appropriate governmental bodies, their chances for success should be *greatly enhanced!*

A community analysis should be done by every library and then regularly updated. Both long and short range goals should be formulated, adopted, recorded in writing, and reviewed and updated. Next, against such a framework of goals, objectives should be set with a time frame for their completion. For example, the library to which I am related has an objective for this year, to become the primary source for "how to" and support information for each of our municipal departments.

For the implementation of these objectives; it is necessary to establish additional policies, these policies should consider at least the following:

1. General
Mission and Goals Statement, which I have just mentioned
Specific Objectives in a time frame
2. Organization and Administration
3. Personnel
4. Finance
5. Buildings and Services
6. Materials Selection
7. Circulation
8. Community Relations
9. Legal Counsel

Some of these policies may be unwritten, like

1. When the machinery breaks down, do assemble the board (don't take any unilateral action)
2. Before a new trustee appointment, "Get to" the appointing authority with information on the type of person needed and suggestions of individuals who could do the job.
3. Before the budget is finalized, "Get to" your funding body and keep the library program sold—and remember this at other than budget time also!

Just as goals have to be reviewed and updated from time to time, so do policies—and it is the responsibility of both trustees and professionals to see to it that such reviews take place. If policies are comprehensive and sound, and if the policy makers are smart enough to let the librarian administer the library within the framework of these policies, *the action which results* will be something of which we can all be proud.

There is another area of mutual responsibility which trustees and librarians share—This is the growing need for effective measurement and evaluation. Throughout the history of libraries, a few simplistic statistics have been gathered, such as the number of items in the collection, circulation figures, dollars spent, attendance at programs, etc.—certainly, we must become more sophisticated in our measurement and evaluation of our effectiveness—and it will take the creative intelligence of many of us to devise the methods needed for doing this—some experimentation has been carried out. Much more is needed.

One other *point*—I want to emphasize the value of talking with your neighbors—as you are doing here today—as many of you do regularly through your membership and participation in NCLA and your Trustee Section—and even further through ALA and ALTA—As Don Earnshaw says, "We need each other"—and I would be remiss in my duty if I didn't urge every library board to have at least one member in the American Library Trustee Association—your pipeline to the latest and most helpful information on trusteeship from all over the country.

I hope every one of you will receive much satisfaction from your service as a trustee.



The Convention Committee: Leland Park, exhibits; Mary Frances Crymes; Bill O'Shea, program; Richard Barker, registration; Arial Stephens, local arrangements, general overseer, etc.