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# HANDBOOK

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*for* **Connecticut  
Library Friends**

**The Friends of Connecticut Libraries**  
August 2006



Middletown Library Service Center  
786 South Main Street  
Middletown, CT 06457  
860-344-2972  
[www.cslib.org/focl](http://www.cslib.org/focl)

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*prepared by* **Mary L. Sieminski and Patricia L. Owens**, RPA Inc.  
*for* **The Friends of Connecticut Libraries** August 2006

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a Nation of Learners, because lifelong learning is critical to success.*



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# Preface

Since our founding, we of the Friends of Connecticut Libraries have responded to a wide range of questions from local Friends groups around the state. We realized that, if we had a handbook that addressed the basic issues common to all Connecticut Friends groups, local groups could have the answers to most of their questions readily at hand. We resolved to create such a handbook and to provide the handbook to every library Friends group in the state.

With funding provided by a Library Services and Technology Act grant from the Institute of Museum and Library Services through the Connecticut State Library, we were able to hire consultants to develop the handbook we envisioned.

This handbook is a practical guide to establishing and maintaining local Friends of the Library (FOL) organizations in support of libraries in Connecticut. It is a useful reference for new and experienced Friends officers and board members, community members interested in forming new Friends groups, library directors and staff, trustees, and local government officials.

A note on terminology: There are many variations on the titles of library directors and trustees. We have chosen to use the term “library director” for the person with the main administrative responsibility for the library and “board of trustees” for the governing board of the library. We have used the “public library” to refer to both municipal and association libraries.

A list of additional resources, containing both printed material and websites, can be found in the appendix to this handbook. A glossary of acronyms and library terms is also included.

This handbook is also available on the FOCL website.

We would like to take this opportunity to thank Kendall Wiggin, State Librarian, and Sharon Brettschneider, Director of the Division of Library

Development, of the Connecticut State Library for their ceaseless support and for their help in securing the LSTA grant. We would especially like to thank Mary Engels, our liaison and advisor from the Connecticut State Library, without whose knowledge and files we would not be able to function.

## **The Policy and Development Committee Friends of Connecticut Libraries**

Anita Wilson, *Chair*, Newington

Mary Engels, Connecticut State Library

Patti Flynn-Harris, Cheshire

Richard Lowenstein, Westport

Carl Nawrocki, Salem

## The Friends of Connecticut Libraries

“I cannot remember a time that, after getting together at a FOCL sponsored meeting or gathering, I did not come home with a number of good ideas and some phone numbers of people who were willing to go even further.” —Carl Nawrocki, Friends of the Salem Library

For over twenty-five years, the Friends of Connecticut Libraries, with the consistent and dedicated support of the Connecticut State Library, has been providing resources to local Friends groups through programming, a newsletter, a website, a comprehensive resource file, and the extensive knowledge of its staff, its president, and board members.

Nationally known and recognized for its service to libraries and to Friends of the Library groups statewide, FOCL includes over one hundred local Friends groups, organizations such as the Connecticut Library Association and the Association of Connecticut Library Boards, various booksellers, and many individual members. Its offices are located at the Middletown Library Service Center.

**FOCL fosters communication** between Friends groups dispersed throughout the state. Its newsletter, *FOCL Point*, provides news from various groups and features useful information on Friends issues and activities, such as fundraising, marketing, and membership.

For instant communication among Friends, FOCL established **FOCL-Forum**, an electronic discussion list for Friends of the Library in Connecticut. Members find that FOCL-Forum is a valuable tool for solving problems. Through the list, local Friends can share ideas and ask questions of each other—and get answers. Messages of general interest are rapidly

communicated to the community of Friends. If you have books left over from a book sale and want to offer them to other Friends groups in the state, you can post the offer on FOCL-Forum. If you have questions about how to set up a silent auction, you can post the question on FOCL-Forum.

Annually FOCL publishes a directory of FOCL members, which includes Friends activities and a comprehensive calendar of book sales.

**FOCL promotes awareness** of legislative issues in the state and nation that affect libraries and their supporters. FOCL also communicates to state and national Friends groups the successes of Connecticut groups and the challenges and issues facing local libraries and local Friends groups.

Each year FOCL sponsors statewide awards for outstanding local programs and contributions by individual members.

**FOCL provides advice** to new and existing Connecticut Friends groups through regional and statewide workshops and sharing sessions. Workshop topics have included marketing, advocacy, grant-writing, and membership drives. Each workshop is geared towards Connecticut Friends.

Upon request, FOCL staff and board members will visit local Friends groups to provide information and support. FOCL will assist groups in bolstering an organization that has begun to lose focus or momentum.

**The FOCL website** at [www.cslib.org/focl](http://www.cslib.org/focl) provides membership information, calendars, information on activities and services, and links to other library resources. Among the features are resources and information on forming and maintaining a local Friends group. FOCL also maintains a resource file, open to all members, containing information about successful fundraisers and membership campaigns, and samples of Friends bylaws, etc.

The Friends of Connecticut Libraries maintains a cooperative relationship with Friends of Libraries USA (FOLUSA), the organization that supports Friends groups at the national level.

The help that the Friends of Connecticut Libraries provides to Friends groups is critical to their success and critical to the overall mission of supporting the libraries in our communities.

Among the goals that FOCL has established for the future are to have a Friends group for every library, to have every Friends group be a member of FOCL, and, to be the first place to which Connecticut Friends groups turn for information.

## Why Friends?

“There is not such a cradle of democracy upon the earth as the Free Public Library, this republic of letters, where neither rank, office, nor wealth receives the slightest consideration.” —Andrew Carnegie

### Why Support Public Libraries?

The quality of life in our communities and our nation is improved by the public library. Public libraries are truly democratic. They serve every segment of the community—young and old, rich and poor, college graduates and high-school dropouts. Public libraries in Connecticut are free: there are no admission requirements and no admission fees.

Libraries serve individuals, families, and the business community. They foster both economic and personal development in the areas they serve. Libraries provide books, magazines, databases, audio and video materials, computer access—and trained librarians to facilitate their use.

### Why Friends?

Friends groups are critical to the success of public libraries. Friends support the library and expand its effectiveness in the community. And in the process, Friends provide an opportunity for individuals to make a contribution to their community.

- **Friends provide financial support** by generating revenue to supplement the library budget through membership dues and fundraising activities.

- **Friends provide grassroots support** for the library in the community.
- **Friends are good-will ambassadors**, spreading the word in the community. They stimulate greater awareness of the wide array of library programs and services.
- **Friends advocate for the library** in the community by speaking out on local, state, and national issues that affect libraries. Members speak to civic groups in the community, attend meetings, and contact government officials on behalf of their library.
- **Friends sponsor library programs**—talks by authors, book discussion groups, art shows, musical events, and other activities of cultural interest to the community.
- **Friends provide volunteer help** in the library when and where it is needed.

## Library

Here is where people,  
One frequently finds,  
Lower their voices  
And raise their minds.

—*Light Armour*. McGraw-Hill, 1954.

## Friends: From Concept to Reality

“Before we had a Friends group I had no idea what a difference they would make to my library. It’s like night and day. Now I can’t imagine working in a library without a Friends group.” –Tom Geoffino, Fairfield Public Library

This handbook is designed to take committed individuals and groups from recognizing the need for Friends of the Library to establishing a group in support of their own local library. These are meant to be guidelines, a path to follow, but not every group will follow exactly the same path.

Who takes the lead in the process varies by community. In some cases library director or a trustee might invite community members to form a group. At other times, a local service group, through a committee on civic or community affairs, spearheads the effort. Often a farsighted individual or individuals simply get people together to form a group.

Whoever takes the lead should take several basic organizational steps in establishing a group. Although each group may be slightly different in its composition, and the timing of the process might vary, following these steps will assure that your group is built on a strong foundation. Completing the process could take from two to six months.

The basic steps are outlined below. The remainder of this chapter expands upon these steps.

## What are the essential steps?

- Step 1:** Recruit a core group of supporters.
- Step 2:** Hold an invitational meeting of the core group and representatives of the library to formally discuss the establishment of a Friends group.
- Step 3:** Lay the groundwork by establishing a clear mission, recruiting officers, drafting bylaws, and establishing membership criteria.
- Step 4:** Plan and hold the first public meeting at which the Friends officially become an organization.

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### **Step 1: Recruit a core group of supporters**

The first step in the process is to enlist a core group of three to five library supporters. This core group will function as a steering committee and then may continue on in leadership positions in the new Friends group. At the same time, solicit the support of the library director and trustees. Their support is critical to the success of the Friends. Groups should also contact the Friends of Connecticut Libraries (FOCL). FOCL will provide expert help and guidance throughout the entire organizational process.

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### **Step 2: Hold an invitational meeting**

Invite the core group to meet with the library director, a representative of the trustees, and a representative from the Friends of Connecticut Libraries to formally discuss the establishment of a Friends group. Schedule the meeting in the library.

### **What Happens at the First Invitational Meeting?**

- Affirm the commitment of the library administration, trustees, and potential “Friends” to the formation of a Friends group. Begin to determine its basic mission and purpose and its basic organizational structure.

- Pass a resolution “That a Friends of the (City/Town) Library be formed to (accomplish certain goals).” An example of a goal is “to support and promote the library in the community.”
- Select an interim chairperson and an interim secretary. The interim chairperson and secretary will serve until a formal election takes place at the first public meeting.
- Select chairpersons for the initial committees: bylaws and nominating.
- Make initial plans for presenting the Friends to the public at a public meeting.

## Sample agenda topics for the invitational meeting

- 1.** Welcome all participants.
- 2.** Explain the purpose of a Friends group, the need for Friends in the community, and its relationship to the library. Discuss in general the needs of the library and goals of the Friends.
- 3.** Library director and/or trustee affirm the need, and FOCL representative affirms the importance of Friends.
- 4.** Present the resolution “That a Friends of the (City/Town) Library be formed to (accomplish certain goals)” and conduct a vote.
- 5.** Elect an interim chairperson and an interim secretary.
- 6.** Establish a nominating committee and appoint a chairperson to prepare a slate of officers to present at the first public meeting.
- 7.** Establish a bylaws committee and appoint a chairperson to draft bylaws to be discussed or approved at the first public meeting. Even if all the bylaws are not complete, it is important to have a clear idea of the special mission of your Friends group and to establish criteria for membership and a dues structure. (See later section on bylaws and samples of bylaws in the appendix to this handbook.)
- 8.** Schedule the next meeting to plan the public meeting and receive reports from the bylaws and nominating committees.
- 9.** Have those present sign in to show their support to form a Friends group.
- 10.** Adjourn.

## **Step 3: Lay the groundwork**

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**T**he outcome of the invitational meeting is the firm commitment of all parties to proceed with the necessary steps to establish a Friends group. The core group of library advocates and supporters now is essentially a steering or planning committee. Their work continues under the leadership of the interim chairperson with the goal of forming a Friends organization.

The chairperson will establish a schedule for the steering committee to

- Establish the initial role and mission of your Friends group
- Draft the bylaws
- Establish membership categories and dues structure
- Recruit officers and board members.

### **Establish the Initial Role and Mission of Your Friends Group**

**T**he motivation for forming (or continuing) a Friends group differs from one library to another depending on library and community needs. Friends might want to help build a new library collection or provide a new service. From their own funds, Friends provide services, opportunities, and equipment that would otherwise not be possible for the library to have.

It is important to articulate the reason for organizing your Friends group, as this will have an effect on future decisions. It will have an influence on who will become members and the contributions they will make. Groups should be sure that the library administration, trustees, and potential Friends are in agreement on the expectations for the Friends.

The roles that your Friends group will play will be expressed in the organization's mission statement and bylaws.

### **Which of these roles will your Friends play?**

#### **Providing financial support**

- Undertake projects to support or expand current services
- Assist in a campaign for a new building or renovation
- Raise money for new services and programs

- Secure needed equipment to meet program goals

### **Volunteer service**

- Provide volunteer help in the library and for the library

### **Programming**

- Assist library staff in providing activities of cultural interest to the community
- Sponsor Friends series of programs, speakers, book reviews, etc.

### **Advocacy**

- Speak to groups about the value of the library
- Promote the use of the library in the community
- Advocate for bond issues
- Advocate for government budget support

**E**ach of these roles is more fully explored in Chapter 6, “What Friends Do.” Many groups do all of these things at some time, but each group will identify one or two that meet library and community needs. Expect the role of the Friends to shift and evolve throughout the life of the organization. To be successful, new groups will want to focus their attention and be clear about what they want to accomplish.

## **Mission Statement**

**T**he roles that the Friends will play are reflected in a general way in what is termed a “mission statement.” See the appendix to this handbook for more information on the use of a mission statement and samples of the mission statements of established Friends groups.

“Clearly and concisely define the group’s goals and mission; what do you hope to accomplish? Once that is decided, you have only just begun.” —Mary Maki, Friends of the C. H. Booth Library, Newtown

## Draft the Bylaws

The word “bylaws” seems intimidating, but bylaws are simply a formal statement of the fundamental purpose and procedures of a group. Bylaws clarify the group’s reason for existing and provide a basic framework for its processes. Bylaws outline the organizational structure within which your Friends group will operate, defining membership, meetings, officers, and committee structure.

- Bylaws outline specific procedures for the group’s functioning.
- They help your group conduct business in an orderly manner.
- Bylaws need to be in place before you apply for incorporation and tax-exempt status. (See Chapter 8 for details.)

## What do bylaws include?

1. Name of the organization (the official name that will be used on all legal documents, including the certificate of incorporation and the application for tax-exempt status)
2. Purpose of the organization (the “mission statement” that will guide future decisions on planning, programming, and spending of the organization’s money and define who will be served by the organization)
3. Governing body
  - Titles of officers
  - Terms of office
  - Selection of officers and board members
  - Appointment and duties of standing committees
  - Provision for special committees
4. Membership
  - Who can join
  - How to join
  - How dues are set
  - Rights of members
5. Meetings
  - Time, place, and frequency
  - Methods for calling meeting

- Attendance requirements
- What constitutes a quorum
- 6. Fiscal matters—defining the fiscal year, how financial matters will be conducted, auditing procedures, etc.
- 7. Procedure for amending bylaws
- 8. Parliamentary authority (rules of order followed at official meetings, usually Robert’s Rules of Order)
- 9. Dissolution statement (what will happen to the organization’s property if the organization dissolves—this statement is needed for the tax-exempt status application)
- 10. Date of adoption

## Suggestions for creating bylaws

**Y**ou don’t need to create the bylaws for your new Friends group from scratch. There are examples in the appendix to this handbook, and several examples of the bylaws of other Connecticut Friends groups can be found on the FOCL website.

- Make the bylaws clear, but not so detailed that they need to be amended frequently.
- Changes to bylaws need to be reported to the state government agency that oversees incorporation (in Connecticut, the office of the Secretary of the State). For this reason, it is best that such topics as amount of membership dues and scheduling of meetings be dealt with in general rather than specific terms. You don’t want to go through a bylaws change every time you establish a new membership category, appoint a committee, or change the board’s meeting schedule.
- Keep it simple. Don’t box yourself in by calling for a meeting on a specific date or setting the number of members needed for a quorum too high! For example, indicate that your general meeting will be held every June, instead of on the second Wednesday of June at 4 p.m.
- Use the language from your original resolution as a foundation for the purpose section.
- Having the bylaws completed will make applying for incorporation easy. Among the requirements for a certificate of incorporation in Connecticut are a number of the provisions already set forth in the bylaws, including what will happen if the group dissolves.

- Don't be confused by the terms "constitution" and "bylaws." The two are often used interchangeably. Technically speaking, a constitution is a concise statement of purpose, and bylaws provide the framework for the processes. Bylaws contain all the elements of a constitution, but are more detailed and specific. A constitution is rarely revised; bylaws are amended regularly.

“State your mission; clearly state the roles of officers, committee heads, how meetings are called, fiscal operations, and membership including a non-discrimination clause. Utilize the FOCL website for helpful information on developing your bylaws.” —Mary Maki, Friends of the C. H. Booth Library, Newtown

## **Establish Membership Categories and Dues Structure**

New groups will need to determine the answers to these questions:

- **Who will be eligible for membership?** Generally membership in Friends groups is open to individuals, families, organizations, associations, and businesses.
- **If you will have categories of membership, what will these be, and how will they be determined?** Generally a board of directors determines this.
- **What will the dues structure be and how will the dues structure be determined?** Generally a board of directors determines this.
- **What benefits will accrue from membership?** Generally each member is entitled to one vote at any meeting of the membership.

This structure will need to be in place for the bylaws and—more importantly—to recruit new members. Membership dues are an important part of a new group's budget. Groups often offer several categories of membership so that membership is within financial reach of everyone including students, teens, and retirees. Some groups establish several higher membership levels for those who wish to give more.

There are samples of membership forms in the appendix to this handbook.

## **Recruit Officers and Board Members**

**A**t the invitational meeting, you appointed a chairperson for the nominating committee. It is his or her job to recruit nominees for officers and board members to be presented at the first public meeting. You will need to have nominations for president, vice-president, secretary, and treasurer in addition to several members of the board of directors. Generally one slate of nominees is presented, but nominations are accepted from the floor. Below are the suggested duties of the officers.

### **President**

- Presides at meetings
- Creates an agenda for each meeting for the secretary to distribute to the board
- Appoints standing committee chairs
- May sign checks with the treasurer
- Serves as a member of each committee (*ex officio*)
- Assures a smooth transition for new officers by maintaining files, etc.

### **Vice-President**

- Presides at meetings in the absence of the president
- Fills in if the president cannot complete term
- Represents the Friends organization with the president at civic events, meetings, conferences, and conventions

### **Secretary**

- Records attendance and takes minutes at meetings
- Distributes agendas and minutes
- Is responsible for all correspondence
- Maintains a record of programs, publicity, etc.
- Maintains a permanent record of all minutes, copies of bylaws, certificate of incorporation, etc.

## Treasurer

- Maintains financial records
- Signs all checks
- Prepares the budget for approval
- Reports on the financial status at each meeting
- Prepares and submits all required federal and state tax filings

## Members of the board of directors

- Attend each meeting
- Approve annual budget and plans
- Determine membership categories and dues structure
- May become future committee chairs

## Hints for choosing good officers and board members

- Remember that this is a working group; the appointment is not “honorary.”
- Choose people who work well with others, get things done, and are responsible.
- Choose people who will advocate for the library and personally support it.
- Choose people who are able to make the time commitment necessary.
- Select as president a person who has the ability to run smooth meetings, limit non-productive discussions, and keep the meeting moving toward its goal of supporting library programs and services in the community.

## **Step 4: Plan and hold the first public meeting**

**W**hy have a public meeting? The first public meeting is a combination business meeting and a library promotional event. At this meeting you will pass the formal resolution establishing the Friends. You will elect officers and approve the bylaws. This meeting is the first of the annual meetings of the membership.

Just as importantly, you will introduce the Friends to members of the public, while gaining their support. You will make more people aware of library needs and will stimulate further interest in the library, as well as recruit leaders and volunteers.

## **Guidelines for Planning the First Public Meeting**

- Promote the resolution “That a Friends of the (City/Town) Library be formed” as the basis of your publicity campaign.
- Define the goals of your Friends group clearly.
- Identify whom you want to invite to the meeting:
  - Seek potential Friends, high-profile community leaders, and library users.
  - Ask library staff to identify library users who might be interested.
  - Invite library staff and trustees and municipal officials.
  - Invite members of Friends groups in neighboring communities.
  - Invite every organization in town to send a representative. Ask the local Chamber of Commerce for a list.
  - Include businesses, community groups, social and civic groups, clubs, posts, and religious groups.
- Extend a personal invitation to those whom you would like to see in attendance; this is sure to bring results.
- Ask the library director, a trustee, and a representative from FOCL to speak at the meeting.
- Publicize the meeting widely—in the newspaper, through flyers in the library, on posters on bulletin boards throughout the town. Place an announcement on your local radio and television stations. This meeting is a public meeting and everyone is welcome.
- Use photos of the committee members in your press release to bring attention to the article.
- Post an invitation on the library homepage.
- Hold the meeting at the library itself if possible. Be sure you have chairs, a microphone—and plenty of refreshments.

## Tips on planning a meeting

**Provide everyone on your planning committee with an assignment and a deadline.**

- Who will do the publicity? Of what will it consist?
- Who will make the flyers? Where will they be posted?
- How far in advance will invitations and press releases go out? (Three weeks is advisable.)
- Who will buy the refreshments?
- Who will reserve the room and make the room arrangements?
- Where will the money come from to do all of this?
- Who will do the cleanup?

## Holding the Public Meeting

### What happens at the public meeting?

**T**he formal resolution to establish a Friends group is passed, your Friends group officially comes into being, officers and board members are elected, all your hard work pays off, and you are up and running!

### Sample agenda topics for the public meeting

1. The interim chairperson reports on the initial meeting, reads the newly written resolution and explains the need for Friends in the community, as well as its relationships with the library staff and trustees.
2. Introduce guests:
  - The library director and/or a trustee say a few words about the need for such a group.
  - An invited guest from the Friends of Connecticut Libraries endorses the need for a Friends group.
3. The nominating committee submits the slate of officers and board members for election and invites nominations from the floor.
4. Board members and officers are elected—president, vice-president, secretary, and treasurer.
5. The newly elected president takes charge.

6. The bylaws committee presents bylaws for discussion and/or adoption.
7. The president asks for volunteers for various committees.
8. The newly elected secretary gathers the names of attendees and volunteers and invites those present to become members.
9. A date is set for the newly elected officers and board members to meet.
10. Meeting is adjourned.

**Follow the meeting with an informal time for attendees to mingle and discuss the Friends and the library. Serve refreshments and have membership forms available.**

**At the end of this meeting** you will have:

- Formal endorsement by the community
- Officers and board members
- Volunteers for the initial committees
- Initial community interest

**Closely following this meeting**, schedule a board meeting at which you should:

- Appoint standing committees, such as membership, program, publicity, and hospitality.
- Appoint a committee to work on the first program or project.
- Appoint a committee to research incorporation and tax-exempt status.
- Set a date for the next executive committee meeting, at which you will hear reports from the newly formed committees.

**Be sure to**

- Write thank-you notes to everyone who helped make the meeting a success.
- Followup with all attendees and potential volunteers, informing them of the progress of the group.
- Join Friends of Connecticut Libraries (FOCL), if you have not already done so, at [www.cslib.org/focl](http://www.cslib.org/focl).



## Friends Up and Running: the First Year

**D**uring your first year, you will continue to hold regular meetings of the board and you will establish committees. You will identify the projects and programs you wish to sponsor and support. You will develop an annual work plan and an initial operating budget. The year will conclude with the first annual meeting of the membership. This chapter will address each of these first-year activities.

### Conducting the Regular Meetings

**A**t the board meetings—and in between meetings—committees will conduct the real business of the Friends. Committee chairpersons will report at each board meeting on their activities and present recommendations for approval.

#### Sample agenda for board meetings

1. Call meeting to order
2. Approve minutes and agenda
3. Receive public comment
4. Introduce guests
5. Announcements and correspondence
6. President's report
7. Treasurer's report
8. Standing committee reports (for example, program, membership)
9. Special committee reports (for example, book sale, award)
10. Old business
11. New business
12. Adjourn

## Tips for good meetings

- All groups are different. Some may like to chat; some just want to get down to business.
- Keep the meeting on track and limit unproductive discussion politely.
- Start and finish meetings on time.
- Remind members at each meeting of the value of the service they are performing.
- At the end of each meeting, be sure that everyone knows what his or her assignment is. Ask those present to recap the action items.
- Refreshments are always welcome.

## Establishing Committees

One of the best ways to accomplish Friends goals and objectives is to establish a committee structure. The board generally provides a job description for each committee and designates a chair. The chair recruits committee members from the board and from the general Friends membership.

Most likely you already have these committees in place:

- Executive—Friends officers
- Bylaws—responsible for drafting bylaws and keeping them up to date
- Nominating—recruits new board members and presents a slate of officers

Add next:

- Budget and Finance—oversees budget and financial activities
- Program—responsible for Friends programs. This committee is often the heart and soul of the Friends.
- Membership—maintains member lists and recruits new members

Add as needed as the organization grows:

- Newsletter—publishes a regular newsletter for members
- Fundraising—does the overall planning for fundraising
- Publicity—works with the board to publicize all Friends activities
- Hospitality—provides refreshments, name tags, etc.

Add special-purpose committees as they are needed. These special committees are sometimes called “ad hoc” and exist only until their purpose has been accomplished. Permanent committees are called standing committees.

### **Duties of committee chairpersons:**

- Recruit committee members
- Attend board meetings and present reports
- Hold planning sessions with their committee members
- Maintain written records for future reference

### **Tips for choosing good committees chairs and members**

- Look for a good mix of people who are representative of your community.
- Remember that not all committee members need to be on the board.
- Have a mix of “visionaries” and “brass tacks” folks.
- Select as committee chairs people who have the ability to run smooth meetings.
- Choose people who are able to make the time commitment necessary.

### **Suggestions for First Year Projects**

**D**epending on the mission and goals of your Friends group, the first projects might be very clear-cut. If the group was created in response to an immediate need to advocate for a library bond issue, provide volunteers for a story hour, or provide a pilot collection of special materials for the library, your first projects might be very clear.

If not, you might choose one project from each category of the Friends goals. Choose projects that are simple and low budget for your first year. Make it a priority to make the Friends and the library more visible in the community. Choose projects that bring people together in their effort to support the library.

## Some possible first year projects are as follows

### Programming

- Plan and staff a book discussion group in the library. Make it a brown bag lunch with the Friends supplying beverages and dessert.
- Plan and hold one program, perhaps in conjunction with another local organization.

### Community relations

- Promote library cards in the community by staffing tables at community events and taking registrations.
- Participate in the nationwide “Books for Babies” program in which newborns and their parents receive a gift from the Friends of appropriate books and materials—and the parents receive library cards.

### Advocacy

- Suggest that each board member speak to a group that he or she belongs to about the importance of the library in the community and the value of the support of the Friends.
- Have board members speak at budget hearings and other town meetings in support of the library budget.

### Fundraising

- Plan your first annual book sale.

### Volunteers

- Ask the library director what volunteer services the library needs. Jobs that one or two people can do together might be more fun than a job that is done alone, such as shelving. Volunteers can talk and plan future programs while they work.
- Consider delivering books to shut-ins if the library director agrees.

“My alma mater was books,  
a good library.” —*Malcolm X*

## Developing the First Annual Work Plan

In addition to the first year's budget, a one-year work plan is critical to the first year success of your newly established group. The work plan should reflect your group's stated mission and goals and be approved by the board of directors. In the sample plan below, this Friends group would like to proceed with the legal paperwork, sponsor a book discussion group, hold a book sale, recruit new members, and have an annual meeting. The first annual work plan for a new Friends group might look like this:

### Sample first year work plan

- Establish bylaws (if that task has not already been completed).
- Establish and maintain a flexible, fluid meeting schedule.
- Apply for establishment as a nonprofit corporation in Connecticut.
- Apply for federal tax-exempt status from the Internal Revenue Service.
- Plan and conduct one book sale.
  - January—establish committee and assign tasks.
  - March—advertise for donations of books.
  - March-April—collect books.
  - May—plan for day of sale, sort books, advertise sale itself.
  - June—hold sale.
  - July—debrief with committee and board on results; create a record of activities, timelines, etc., to assure continuity.
- Plan and conduct one other activity, such as a book discussion group.
  - January—establish committee, outline project and assign tasks.
  - February—advertise and take registrations.
  - March-April—conduct book discussions.
  - August—establish fall schedule.
  - September—advertise and take registrations.
  - October-November—conduct book discussions.
- Plan and conduct the annual meeting.
  - March—establish committee, set date, get speakers, reserve room, create publicity.
  - May—advertise and invite members, coordinate with nominating committee for slate of officers and new board members.
  - June—hold meeting.

## Developing the Initial Operating Budget

**D**evelop a simple budget—your estimated income and expenditures—for the first year and have it approved by the board. It may be just guesswork for the first year. After a year of experience, the Friends treasurer, finance committee, and committee chairs will have a better idea of their financial needs and capabilities.

Many groups begin with a donation of \$100 or so for startup costs. New groups may apply to FOCL for a loan of funds to underwrite the initial costs of filing for incorporation, tax-exempt status, and other necessary filings. Sometimes the library is willing to underwrite the initial costs. The library administration may also be willing to provide printing and copying, meeting space, the services of the public relations staff member, etc. Be sure that you are clear about what the library is willing to provide to avoid any misunderstanding that could undermine the relationship of the Friends with the library administration. Many board members donate not only their services, but also supplies, refreshments, etc.

A sample first year's budget might look like the budget below. These are only samples of typical line items for income and expenses.

### Sample First Year Budget

<b>Income</b>	
Dues (30 members at \$10)	\$300
Contributions (5 gifts of \$25)	\$125
Special fundraising projects	\$175
Total income	\$600
<b>Expenses</b>	
Postage (for meeting announcement)	\$125
Stationery and supplies	\$75
Printing and duplicating	\$75
Hospitality	\$100
Program	\$50
Publicity (ads, posters)	\$75
Total expenses	\$500
<b>Balance</b>	\$100

## Planning the Annual Membership Meeting

**W**hy have an annual meeting? An annual meeting is required by the bylaws. Like the first public meeting, it is often a combination of a business meeting and a lively program. It is designed to conduct the required business, highlight accomplishments, and recruit new members and volunteers.

In order to make it a success

- Schedule the meeting during the same month each year, as set forth in the bylaws.
- Invite all members and the general public to attend.
- Prepare a press release for the event and invite the press to the meeting itself.
- Plan an exciting program, perhaps featuring a poet or author.
- Plan to give awards. Not only is this good policy, but it also increases the number of people who will attend the meeting.
- Ask the library director or president of the board of trustees to speak on the importance of the Friends.
- Prepare a written report on the highlights of the year's activities, funds raised, etc.

At the meeting itself:

- Conduct a short business meeting in which officers and new board members are presented and elected.
- Report on the highlights of the year's activities.
- Report on the dollars raised and ways in which the money was used.
- Present the annual Friends award or awards.
- Announce future plans and projects.
- Present the program or speaker.
- Recruit new members—have brochures and membership forms on hand.
- Serve refreshments or even have a luncheon or dinner meeting.

“The work of an executive board or a committee is more of a marathon than a sprint. Friends should prize steadfastness over speed”

—Jack Short, Library Friends Guidelines

“When I got my library card, that’s when my life began.” —*Rita Mae Brown*

## Roles of the Library Staff, Trustees, and Friends

“We are all working towards the same goal, the best possible library for our community and each of us has a different role to play to get to that goal.”

—Mary Engels, Friends of the Cora J. Belden Library, Rocky Hill, and Friends of Connecticut Libraries.

It is absolutely critical that the library administration be supportive of your Friends group. A group simply cannot be successful without the support of the library itself. A Friends program is most valuable when it moves the total library program forward.

The Friends, the library board of trustees, and the library director must be clear about their roles. Although the goal of the Friends, trustees, and library director are to have the best public library possible, their roles in achieving that goal are quite distinct. See the chart printed on the following pages for a description of those roles. This chart is also available on the FOCL website at [www.cslib.org/focl/workingtogether.pdf](http://www.cslib.org/focl/workingtogether.pdf).

Some Friends groups find it beneficial to have a written operating agreement with the library, outlining the roles of each and indicating how the two groups will communicate and keep each other informed.

The Friends and the library administration need to agree on:

- What initiatives the Friends will support
- What will be done with the money that the Friends raise
- What support the library will give to the Friends
- The role of the Friends in advocating for the library
- The roles and responsibilities of the Friends in planning and presenting programs

## Working Together

<b>Responsibilities of</b>	<b>Library Director</b>	<b>Trustee</b>	<b>Friend</b>
<b>General Administrative</b>	Administer daily operation of the library including personnel, collection development, fiscal, physical plant and programmatic functions. Act as technical advisor to the board and ensure staff representation at all friends' board meetings.	Recruit and employ a qualified library director; maintain an ongoing performance appraisal process for the director.	Support quality library service in the community through fund raising, volunteerism and serving as advocates for the library's program.
<b>Policy</b>	Apprise board of need for new policies, as well as policy revisions; implement the policies of the library as adopted by the board; keep friends apprised of all library policies.	Identify and adopt written policies to govern the operation and program of the library including personnel, general operating, and collection development policies.	Support the policies of the library as adopted by the library board; adopt a constitution and bylaws for the friends.
<b>Planning</b>	Coordinate and implement long range planning process with board, friends, staff and community. Long range plan coordination will include preparation of appropriate status reports.	Ensure that the library has a long range planning process with implementation and evaluation components. The process should include input from friends, community and staff. Support the policies of the library as adopted by the library board; adopt a constitution and bylaws for the friends.	Provide input into the library's long range planning process and remain knowledgeable as to the status of the plan.
<b>Marketing</b>	Coordinate and implement an ongoing marketing program.	Ensure that the library has an active marketing program.	Promote the library program to the public.

<b>Responsibilities of</b>	<b>Library Director</b>	<b>Trustee</b>	<b>Friend</b>
<b>Fiscal</b>	Prepare an annual budget for the library in consultation with the board and friends; present current report of expenditures against the budget at each board meeting; make the friends aware of the special financial needs of the library.	Secure adequate funds to carry out the library's program; assist in the preparation and presentation of the annual budget.	Conduct fund raising which complements the library's mission and provides funding for special library projects.
<b>Legislative</b>	Educate board and friends regarding current local, state and federal library laws and pending library legislation.	Be familiar with local, state and federal library laws as well as pending library legislation.	Serve as advocates for local, state and national library issues; represent the library program to legislators.
<b>Meetings</b>	Provide written reports at and participate in all board and friends meetings; ensure that there is a staff liaison to the friends.	Attend and participate in all board meetings and see that accurate records are kept on file at the library; comply with Freedom of Information regulations; appoint a liaison to the friends' board to attend their meetings.	Maintain a liaison to the board of trustees to attend all their meetings. Executive board members should attend and participate in all friends' executive board meetings.
<b>Networking</b>	Affiliate with state and national professional organizations and attend professional meetings and workshops; make use of the services and consultants of the Connecticut State Library, Association of Connecticut Library Boards and Friends of Connecticut Libraries.	Attend regional, state, and national trustee meetings and workshops, and affiliate with the appropriate professional organizations. Make use of the services of the Connecticut State Library and Association of Connecticut Library Boards.	Affiliate with state and national friends' organizations and attend their meetings and workshops. Make use of the services and consultants of the Connecticut State Library as well as the Friends of Connecticut Libraries.

**T**he relationship between the Friends and the library will continually evolve. Establish clear lines of communication to avoid stepping on each other's toes. One proven effective way of assuring communication is to ask the library administration to appoint a staff member to attend Friends of the Library meetings. Friends should also appoint a liaison from the Friends to the library board of trustees.

One way of assuring that Friends work is actually supporting the library is for the library director to prepare each year a "wish" list of library needs for the Friends. Some libraries also find it effective to have the annual Friends work plan/calendar approved by the trustees.

Trustees and library staff should be encouraged to become members of the Friends, but, to keep the individual roles separate and distinct, they should not serve as officers.

**“**Perhaps no place in any community is so totally democratic as the town library. The only entrance requirement is interest.**”**

*—Lady Bird Johnson*

## What Friends Do

### Advocacy

“It is the Friends who have the real power to mandate that public officials support the library.” —Jack Short, Library Friends Guidelines

An advocate is a supporter of a cause. The cause that the Friends support is a vital public library. Support can be formal or informal; to be most effective, it should be both. There is no doubt about it—just the word “advocacy” intimidates some Friends, but advocating for your library can be a simple gesture. You are an advocate

- If you work on a Friends book sale or other fundraiser.
- If you participate in a bus trip sponsored by your Friends group and mention how nice it is that the Friends of the Library sponsored the trip.
- If, at budget time, you attend a budget meeting to show support for your library, whether or not you speak.
- If you work to support a library referendum.
- If you write a letter to the editor in support of the library.
- If you call, write, or email any local, state, or federal official to express your support of your library or libraries in general.

Friends often organize a more formal advocacy campaign if there is a bond issue pending or proposed legislation that would affect the library. Any formal campaign must be carried out in conjunction with the library administration and trustees. Nothing could be more damaging than for politicians and the public to hear mixed messages from various library supporters.

## Ten steps for success

**In a formal advocacy campaign, there are ten steps for success:**

1. Identify potential allies.
2. Establish a coalition.
3. Develop the schedule.
4. Create a simple message.
5. Develop a strategy.
6. Assign tasks.
7. Identify a single spokesperson.
8. Monitor progress.
9. Revise your strategy as needed.
10. Cultivate new partnerships.

## Volunteer Service

“Friends groups succeed because of a common bond—love of books, reading and libraries. Thank your volunteers; tell them how much you appreciate their hard work. Every so often have an informal get-together.” —Mary Maki, Friends of the C. H. Booth Library, Newtown

Friends use volunteers in a variety of ways to accomplish their goals. Each board and committee member is a volunteer, contributing his or her time and energy to the success of the library. Friends plan programs, staff them, and provide refreshments. Friends book sales involve lots of volunteer hours—collecting books, sorting, pricing, staffing the sale, and packing up everything afterwards.

Friends often volunteer in the library itself. With the approval of the library director and staff, Friends often perform a variety of tasks in the library, from shelving books and materials, to searching shelves for lost items, maintaining local history collections, and assisting with children’s story hours. Sometimes Friends staff a bookstore or café in the library.

The most effective way of recruiting volunteers is to ask—almost everyone likes to be asked. It can make a person feel useful and needed. By asking for his or her assistance, you are recognizing that a potential volunteer is of value to your group and the community. For some newly retired people, volunteering offers a way to maintain a connection with the outside world.

Before you recruit, be clear about your needs and why you need volunteers. Write up a simple job description outlining the duties of the position, any requirements, and a general idea of the time commitment necessary. By clearly articulating the way in which each volunteer will benefit the organization, you can help give the person donating his or her time a real and meaningful stake in the endeavor. Offer training and mentoring to new recruits.

## Suggestions for success

- Include a check off section on your Friends membership form listing volunteer opportunities.
- Be sure to follow up with a phone call to each and every person who volunteers.
- Regularly thank your volunteers. Honor volunteers during National Volunteer Week. Have a thank you tea. Give an award at the annual meeting for “volunteer of the year.”
- Keep track of volunteer hours for annual reports and grant applications.

## Programming

### Why sponsor programs?

- Public programs raise awareness about the library, its collections, and its services while raising the visibility of the Friends.
- Programs raise awareness of special library strengths, whether it is genealogy resources or local history or gardening.
- Programs enrich the community and support the educational mission of the library.

## Some typical programs for the library and the community

- Preschool story hours and summer reading programs. Especially in smaller libraries, Friends often assist children's and young adult librarians by taking registrations, setting up, and straightening up afterwards.
- Lunchtime brown-bag book discussion groups where Friends organize the discussion and provide beverages and dessert
- Book and author dinners and book review luncheons
- Special events, such as a Robert Burns birthday dinner or a Cinco de Mayo celebration
- Bus trips to cities such as Hartford, New York, Boston, or Providence for museum tours and special exhibits
- Garden programs and garden tours
- Music and art programs, if these are not available in the community
- Local history and genealogy programs in conjunction with the local historical society

## Tips for planning Friends programs and events

- Make programs and events low-budget affairs for your first year or two; start small and simple.
- Consider co-sponsoring with a local bookstore or another community group, such as the historical society or a garden club.
- Local colleges are a good source of speakers.
- Know the interests of your community and check the community calendar for conflicts.
- Keep careful records of each event—attendance, money spent and raised, publicity, etc. These records will help you assess your success and plan the next program.
- Publicity is critical—not only beforehand to encourage attendance but also on the day of the event. Photographs always provide great publicity.
- Feature Friends programs on the library website.
- Consider making a program an annual “trademark” event—you will know the ropes and can plan more easily. Past attendees will look forward to it and tell friends.
- For more programming ideas, post a question on FOCL-Forum and consult the FOLUSA fact sheet on programming at [www.folusa.org](http://www.folusa.org).

## Fundraising

“Our fundraising efforts provide a great number of programs for children, youth, and adults, purchase a variety of museum passes for our patrons’ enjoyment, and allow for the acquisition of musical selections, audio books, and other library materials, which are not funded by our town budget.” –Donna Groccia-Lubik, Treasurer. Harwinton Library Friends, Inc.

**F**riends of the Library raise money for library programs, services, equipment, furnishings, and materials, making it possible to provide materials and services that are often beyond the bare bones of the library operating budget.

Friends fundraising takes many forms. Friends raise money for the library by selling things—books at a book sale, special Friends merchandise, and tickets to special events. Friends also raise money by having members who pay dues. Friends solicit donations from individuals, foundations, and corporations in fundraising drives and campaigns for special needs.

It cannot be said enough: Be sure that the Friends, the library director, and the trustees are in agreement about how any monies raised by the Friends will be spent.

Be imaginative in terms of your group’s special goals and needs. Be aware of what other nonprofits in the community are doing. Here are some examples of strategies and projects that other Friends groups have used successfully:

### Book sales

- Used book sales continue to work very well for Friends in Connecticut. The FOCL website has a calendar of Friends book sales.

### Sales of Friends merchandise

- Friends often sell book bags, mugs, note cards, bookmarks, pins, and calendars. (See Chapter 8, Step 5 for guidelines on tax implications.)

## Fundraising events

- Possibilities include library fairs, silent auctions, and programs by well-known authors or local personalities, bus trips to cities and museums, and golf tournaments.

## Solicitations

- Friends may spearhead annual solicitations for membership gifts by direct mail, phone, or email.
- Friends may participate in campaigns for special needs, special programs, and endowment funds with the approval of the library director and trustees.

## Membership drives

- Hold an annual membership drive for new members and renewals.
- Be specific about what has been accomplished with membership dollars.

## Fundraising tips

- Giving helps donors invest in their own values by supporting yours. Offer them an opportunity to participate in your good works.
- Some people like to give for things, such as books, special collections, hardware, and software. Make people aware of what the library needs.
- Consider giving donors an opportunity to put their name on a gift—whether it is a single book, a program, or an entire room.
- Give publicity to your donors and sponsors on the library web page.
- Create a “wish list”—perhaps there is a donor who would sponsor a poetry slam for teens or a film buff who would be delighted to fund a collection of award-winning films on DVD.
- The best prospects for giving are those who have given before, which includes volunteers who have already given freely of their time.
- Individual gifts are often the greatest source of revenue.
- You need to ask to receive! You can't be shy.
- Encourage a broad base of support—ask everyone. Don't make any assumptions about who can and cannot give. You could actually insult someone by not asking her or him to give.

- Consider planned gifts. People look for ways to invest their life fortunes in ways that will be valuable for future generations. Public libraries are one of the best investments for the future that a person could make.
- Coordinate Friends fundraising with library and community fundraising.
- Thank all donors. People who feel that their gift was appreciated are much more likely to give again.
- For more ideas consult the FOLUSA Fact Sheet: on fundraising at [www.folusa.org](http://www.folusa.org).

## Marketing and Community Relations

“Every event that the Friends sponsor, every fundraiser that they run, every program that they support shows the community that there are people in their town who value the library and see it as a vital part of the community.”

—Mary Engels, Friends of the Cora J. Belden Library and Friends of Connecticut Libraries

The stated purpose or mission of many Friends groups includes promoting the library and the use of the library in the community. Friends provide the grassroots support for their library. “Marketing” is a modern business term, sometimes equated with sales. In this case, Friends are “selling” the value of the library—its collections, programs, and services—to the community. This includes promoting the value of the library to its funders—the municipal, state, and federal governments that provide budgetary support and the individuals, corporations, and foundations that provide additional support to the library through the Friends.

To be successful, Friends must also promote the library and the Friends to their own membership, their volunteers, and themselves.

**In smaller libraries**, and those with limited staff, Friends might help with the basics of public relations by

- Providing graphics for the library newsletter
- Compiling a list of media contacts for press releases
- Updating the library web page

Friends might raise awareness of the library in the community by

- Sponsoring an annual open house for the community
- Staffing a table featuring library materials and services at events such as health fairs, pet shows, building shows, bridal shows, and business expos

**In larger libraries** and libraries with a library staff member assigned to public relations and marketing, that staff member might help the Friends with their own publicity.

**In libraries of all sizes**, Friends need to “market” the Friends. Groups should make it a priority to develop an attractive brochure emphasizing the importance of the library and its Friends to the community, stating the mission and goals of the Friends in support of the library, summarizing their successes, and offering opportunities for membership and volunteer work. Friends often have their own website, linked to the library website, with all the information above. Membership forms, and even newsletters, can be posted online and distributed electronically.

Getting my library card was like citizenship; it was like American citizenship. —*Oprah Winfrey*

## Keeping Friends Energized

### What Can You Do to Keep Your Friends?

**F**riends groups, just like every other group in the community, do not stay active, productive, and “fun” without work. Continually monitor your group for signs of lagging interest and take action right away. Among those signs are declining membership, reduced renewals, trouble recruiting volunteers, and a lack of attendance at programs. Signs of lagging interest on the board are lack of attendance, apathy, meetings starting late, and important tasks done by the same handful of people.

The following strategies for revitalization are effective with new groups and with groups that have been in existence for many years.

- 1. Have a board retreat.** It’s good practice to have a periodic review of your progress and lessons learned. Bring your core group together for a brainstorming session in a pleasant setting. Review the organization’s mission and goals and examine how they are being met. Using an outside facilitator is often helpful. Connecticut Friends can seek input and advice from FOCL. Create a simple agenda for action with measurable outcomes.
- 2. Establish basic goals and objectives.**
  - Be realistic rather than idealistic in setting your goals
  - Set concrete, measurable goals, for example,
    - Raise \$1500 at the spring book sale.
    - Increase attendance at the annual open house by 10%.
    - Increase membership by 8%.
- 3. Attract and retain members.**
  - Examine the Friends dues structure and the benefits of membership. Do they meet current realities?

- Plan an event with a “hook” that will draw people in. Feature an entertaining speaker. Give prizes—a donation from the local radio station, books bags, or gift certificates for dinner at a local restaurant.
- Examine your goals for increasing membership. Do you want a broader base of support, more members who will contribute financially, or more members who will volunteer? Do you want some of each? Your strategies for expanding membership should reflect these goals. Having a Friends table at the county fair or harvest festival is a way to reach large numbers of people. Personal phone calls to key leaders will reach a smaller number of influential members.
- If you are having trouble getting enough volunteers for long-term projects or committees, solicit volunteers for a smaller commitment of time or for a discrete task of limited duration, such as putting together a mailing. A short-term commitment may turn into a longer commitment.
- When new members join, or when members become active, be sure that their ideas are taken seriously and not dismissed with a “We tried that once before and it didn’t work.” New members will stay only if they are truly valued. Consider assigning new board members mentors.
- Send current members renewal forms and follow up reminders.

#### **4. Examine your newsletter—or start one.**

- Newsletters keep the membership, media, and public officials informed, but they are expensive to produce and distribute.
- Find a good editor.
- Decide on a realistic publication schedule.
- Use lots of photographs and graphics.
- Use the newsletter to thank your volunteers and feature their work regularly.
- Highlight Friends successes.
- Consider featuring stories on community officials.
- Post newsletters on the library website.

#### **5. Examine your communications.**

- Remember that good communication is the key to a successful Friends group.
- Continually examine the way you communicate with the library administration and the trustees. Are the Friends liaison to the trustees and the library liaison to the Friends effective? A staff member should

attend all Friends meetings. Friends should always attend trustees' meetings and present a written report.

- Be sure that all board members are kept in the loop. No one wants to hear (or say), “Hmm, I’m on the board, and I didn’t know that.”
- Consider having board members communicate electronically through email and/or online discussion group.

**6. Be sure you are recognizing all who contribute to your success**

- Make recognition ongoing.
- Remember that handwritten notes of appreciation are always welcome.
- Recognize volunteers at award ceremonies or Friends teas. Award certificates of appreciation. Have volunteers wear Friends nametags or t-shirts that say they are special.

**7. Consider collaborating with other community organizations,**

with the Chamber of Commerce, business groups, and community organizations for programming and projects. Through collaboration, you can enhance your Friends goals and prevent duplication of effort. Working together, whether formally or informally, allows your Friends group to obtain visibility in the community for itself and for the library. Groups to collaborate with:

- The local bookstore on events and promotions.
- The local bus company to provide tours.
- A local Scout troop on a program on using library resources to work toward earning badges.
- Another Friends group in your area on special projects and programs.
- Local school librarians on programs of interest to students.
- A local environmental group.

**8. Always focus on why public libraries are essential** to a free society and how, with the help of Friends, your library can do even more to enhance the quality of life in your community.

“The richest person in the world—In fact all the riches in the world—couldn’t provide you with anything like the endless, incredible loot available at your local library. You can measure the awareness, the breadth and the wisdom of a civilization, a nation, a people, by the priority given to preserving these repositories of all that we are, all that we were, or will be.” —*Malcolm Forbes*

## Establishing Friends Legal Status

“I’ll be honest with you, it was not easy to establish our legal status, especially for our small Friends group. But being incorporated, getting our EIN and completing the 501(c)3 process gives us the necessary foundation as a non-profit organization and will allow us to focus on building a stronger Friends group to more effectively help the library.” –Paul Hart, Friends of the Beardsley and Memorial Library, Winsted

Incorporation is the first of six steps in establishing the legal status of your Friends organization. There are required filings with both the state and federal governments. The process may seem intimidating, but if you proceed step-by-step, it is more time-consuming than difficult. You may also seek the services of lawyer or accountant who will complete the filings for you, perhaps at a reduced rate or at no charge. The suggestions below should not be considered legal advice.

### Essential steps

- Step 1:** Incorporate as an organization in Connecticut. – State
- Step 2:** Obtain an employee identification number (EIN). – Federal
- Step 3:** Obtain tax-exempt status (501(c)3). – Federal
- Step 4:** Obtain Connecticut Income Tax exemption. – State
- Step 5:** Obtain Connecticut Sales and Use Tax exemptions. – State
- Step 6:** Register as a charitable organization. – State

**T**his handbook addresses the general issues that arise when a new Friends group seeks to establish its legal status. Always check for current information before proceeding. Names and addresses of agencies change and the required filings and their identification numbers also change frequently. New state and federal laws are passed and state and federal agencies issue revised guidelines.

The handbook addresses in general terms the legal issues that arise concerning lobbying actions, liability issues, and the need for insurance.

There are several excellent websites with clear guides for forming a nonprofit organization and for establishing legal status.

- The Connecticut Council for Philanthropy website at [www.ctphilanthropy.org](http://www.ctphilanthropy.org) includes information on Organizing a Connecticut Nonprofit, including Getting Started, Incorporation, and Tax Issues.
- The Connecticut Association of Nonprofits maintains a website with relevant materials at [www.ctnonprofits.org](http://www.ctnonprofits.org).
- The Foundation Center has a tutorial on establishing a Nonprofit Organization at [www.foundationcenter.org](http://www.foundationcenter.org).

## **Step 1: Incorporate**

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### **What is incorporation?**

- Incorporation establishes your Friends group as an organization under the law.
- Corporate status is granted by the state of Connecticut.
- The state will issue the organization a Certificate of Organization.

### **Why would you want to incorporate?**

- State and federal tax-exemption requires it.
- Incorporation is a tool for risk management—the organization, not individual board members, is accountable for the actions of the organization.
- Incorporation facilitates dealing with funders, contractors, and employees.
- Incorporation provides stability during personnel changes.

## Are there alternatives?

- Collaborating with another nonprofit
- Establishing an informal club or association
- Finding a fiscal sponsor

## How do you apply?

- Obtain the form to incorporate as “nonstock corporation” from:  
Commercial Recording Division  
Secretary of the State  
30 Trinity Street  
Hartford, CT 06106  
(860) 509-6001

Or download it from the website of the Secretary of the State at [www.sots.ct.gov](http://www.sots.ct.gov).

## How much will it cost?

Approximately \$65 and annual filing fees

## Tips on incorporation

- Applicants are required to select a unique name for their organization. There is a form to complete to reserve a name.
- The information needed to complete the application will be in your organization’s bylaws.
- To facilitate future federal filings, include in your application a section on dissolution and specify the organization’s purpose. The Connecticut Secretary of State’s office suggests that groups contact the IRS before completing the application for incorporation.
- Organizations are required to name a “registered agent” for incorporation. The agent for a new Friends group is generally the public library itself.

## **Step 2: Obtain a Federal Employer Identification Number (EIN)**

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### **What is an EIN?**

- An Employer Identification Number is a federally assigned ID number for an organization.
- It is similar to a Social Security Number for an individual; the Internal Revenue Service assigns it.
- An EIN is also referred to as the federal tax identification number.

### **Why would you want an EIN?**

- It is needed in order to apply for tax-exempt status.
- It may be requested when you open a bank account or transact other financial business.
- It will be needed if the Friends ever have any employees, but applies even to organizations with no employees.

### **Are there alternatives?**

- Not if your Friends group is applying for tax-exempt status.

### **How do you apply?**

- The IRS website at [www.irs.gov](http://www.irs.gov) has very clear instructions for applying.
- You can apply to the Internal Revenue Service by phone, mail, or online.
- Complete IRS Form SS-4 (Application for Employer Identification Number).

### **How much will it cost?**

There is no filing fee.

## **Step 3: Obtain federal tax-exempt status (501(c)3)**

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### **What does tax-exempt status mean?**

- It means that the Federal government (IRS) has ruled that the corporation is a “charitable organization.”
- 501(c)3 is a section of the U.S. tax code.
- The terms “501(c)3 status,” “nonprofit status,” and “tax-exempt status” are used interchangeably.

### **Why would you want tax-exempt status?**

- Nonprofit organizations do not have to pay federal or state corporate taxes, although they may need to file a return.
- Membership dues and donations to the Friends are then deductible by donors for income tax purposes.
- Most foundations require it of organizations applying for grants.
- It assures your members that the organization is being administered in compliance with the law.

### **Are there alternatives?**

No.

### **How do you apply?**

- Forms are available on the IRS website at *www.irs.gov*.
- The application process is time-consuming and lengthy.
- It is possible for individual board members to accomplish, but many groups seek legal or financial counsel to complete the process.

### **How much will it cost?**

- \$500 for an organization anticipating gross receipts averaging more than \$10,000 during its first four years.
- \$150 for an organization anticipating gross receipts averaging less than \$10,000 during its first four years.

## Tips on tax-exempt status

- The Friends group must be a registered corporation in Connecticut in order to apply.
- It may take 3-6 months for the status to be granted.
- Groups may raise funds by noting, “Application for tax-exempt status is in process.”
- Organizations may be required to file IRS form 990 if they exceed a monetary threshold.
- Excellent guidelines are available on the Connecticut Council for Philanthropy webpage at [www.ctphilanthropy.org](http://www.ctphilanthropy.org).

### **Step 4: Obtain Connecticut Income Tax exemption**

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- Organizations that are exempt from federal taxes are generally exempt from state tax, but Friends groups must apply.
- Submit a copy of your *IRS determination letter* along with a completed *Application for Tax Registration Number (REG-1)* to the Connecticut Department of Revenue Services at [www.ct.gov/drs](http://www.ct.gov/drs).
- There is no filing fee.

### **Step 5: Obtain Connecticut Sales and Use Tax exemption**

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- Friends may be exempt from both paying and charging sales and use taxes under some conditions.
- Connecticut law provides for an exemption from Connecticut sales and use taxes for qualifying nonprofit organizations. An organization that was issued a federal Determination Letter of exemption under Section 501(c)(3) or (13) of the Internal Revenue Code is a “qualifying organization” for the purposes of the exemption from sales and use taxes.
- Apply for the permit to the Connecticut Department of Revenue Services at [www.ct.gov/drs](http://www.ct.gov/drs). There is no filing fee.

- Nonprofit organizations that sell goods or services are generally required to obtain a *Connecticut Sales and Use Tax Permit* and to collect sales tax on those sales. There are exceptions to the general rule. For example, a nonprofit organization may make sales at up to 5 fundraising events per year without collecting sales tax.
- For information on this exception to the general requirement to collect the sales tax, see the Connecticut Department of Revenue Service publication, *Exemption from Sales and Use Taxes of Sales by Nonprofit Organizations at Fundraising or Social Events*.
- Connecticut law also exempts “book sales by library support groups” from this requirement. See CT General Statutes, Chapter 219, Sec. 12-412 (24).

## **Step 6: Register as a charitable organization**

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- The Connecticut Solicitation of Charitable Funds Act requires that most organizations register with the Department of Consumer Protection if they solicit money for charitable purposes even if the Friends group is incorporated and has tax-exempt status.
- Registration is with the Connecticut Attorney General’s Office at [www.ct.gov/ag](http://www.ct.gov/ag). See the section on Charities.
- There is a \$20 filing fee.

### **One additional step for Friends that own property:**

#### **Obtain a Connecticut property tax exemption**

- If the Friends group owns property, check with the Assessor’s Office in the city or town in which you incorporate to see if the property is exempt from local property taxes.

## Legal Limits on Friends Political Activity

**A** nonprofit organization (that is, one that has applied for and/or has been granted 501(c)3 status by the Internal Revenue Service) has some limitations placed on it in regards to political activity. For Friends, this means that if you, as a group, lobby legislators or participate in political campaigns, you need to know the legal limits.

### Can the Friends endorse a candidate for office?

- No! Friends groups are prohibited from endorsing or financially supporting a candidate for office, whether at the federal, state, or local level.
- Friends (and other non-profits) cannot make partisan comments in official organization publications or at official functions.
- Friends groups may invite political candidates to speak at their events without jeopardizing their status.
- For more information regarding political activities of charities, see the IRS publication, *Election Year Issues*, available from the IRS website at [www.irs.gov](http://www.irs.gov).

### Can the Friends legally lobby for legislation favorable to libraries?

- Yes! There are, however, certain legal limits to how much time and/or money can be spent lobbying; generally Friends may not make lobbying a “substantial part” of its activities.
- The general guideline for the amount of money that any nonprofit may spend on lobbying activities is 20% of its annual budget.
- Although there is not a definition of “substantial” amount of time, lobbying certainly cannot be the only focus of the Friends.
- Attempting to influence legislation includes contacting or urging the public to contact members of a legislative body for the purpose of proposing, supporting, or opposing legislation.
- Be aware, these limits do not apply to individuals who are members of the Friends. Individuals may speak freely, so long as they indicate that they are speaking as individuals and not for the Friends of the Library
- If you have questions or concerns, consult an attorney.
- For further information, contact the Connecticut Election Commission.

## **Do Friends Groups Need Insurance?**

**A** recurring question on Friends listservs and to the Friends of Connecticut Libraries is “Do we need insurance?” Unfortunately there is not a clear-cut answer. Each Friends group must take into consideration both its own activities and the specifics of the insurance coverage of the local library and the municipality. Below are some frequently asked questions about insurance.

### **Why would the Friends consider purchasing insurance?**

- Insurance can protect the organization, its officers, volunteers, and board members in case of a lawsuit. Generally, the concerns of Friends are that people might be injured at Friends-sponsored events.
- General liability insurance is similar to homeowners’ insurance—it provides protection from personal injury claims and against loss from fire or other catastrophes.

### **What activities leave groups most vulnerable to lawsuits?**

- The Friends group frequently engages in activities open to the public that take place outside the library.
- The Friends operate a bookstore in another location than the library
- The Friends have employees and/or large assets.

### **Are Friends covered under the general library policy?**

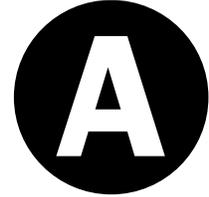
- There is not one answer. Groups need to consult with the library and the municipal office that deals with liability issues.
- Generally, if the Friends hold events in the library, they are covered by the library policy.
- In Connecticut, nonprofit corporations are governed by the Connecticut Revised Nonstock Corporation Act (the “CRNSCA”). The CRNSCA ([www.cga.ct/2005/pub/Chap602.htm](http://www.cga.ct/2005/pub/Chap602.htm)) specifies that individual directors are not personally liable for negligence if the director has acted in good faith and in what the director reasonably believed is in the best interest of the corporation.

## **What type of insurance do Friends most commonly purchase?**

- General liability insurance is the most popular type of insurance purchased.
- Some Friends groups purchase Directors' and Officers' (D&O) liability insurance, but most sources suggest that this insurance is not needed, especially when the organization has no employees.

## **Who should you consult before making a decision?**

- Consult the library or municipal official responsible for risk management.
- Consult local insurance agents. It would be wise to consult more than one to get information on the costs and coverage of several different proposed policies.



## Sample Mission Statements

### What is a Mission Statement?

- A mission statement defines the core purpose of a group—the reason for its existence. It states what the organization does, for whom, and where. It should be no longer than a paragraph, easily understood, and free of jargon.
- Your Friends group will have had a start on its mission statement in the original resolution presented to the public when the group was in its formative stages.

### How Will the Mission Statement Be Used?

- You will use the same, or very similar, language to describe the purpose of your organization in the bylaws.
- A version of your mission statement will appear as the purpose of the group in your application to the State of Connecticut for incorporation
- The mission statement should be prominent in all Friends printed and promotional material.
- The mission statement will be used to keep the board focused and on track and in lobbying on behalf of the organization.

### Sample Mission Statements of Friends Groups

- The Friends of the James V. Brown Library brings together a group of citizens who actively support the library through advocacy, volunteer services and fundraising.
- The purpose of the Friends shall be to further the services of the Willoughby Wallace Memorial Library to the community by arranging for art, music and other cultural and educational exhibits and activities of interest to all ages.

- The purpose of the Friends is to bring together individuals interested in the Johnson County Library System, promote informed community interest in library functions, resources, services and needs, and to raise supplementary funds for the Johnson County Library.
- The purpose of the Friends shall be to maintain an association of persons interested in good library service; to increase the facilities and service of the Cora J. Belden Library; and thus to enrich the cultural opportunities available to the citizens of Rocky Hill.
- The purpose of the Friends of Killingly's Bugbee Library shall be to focus public attention on library services, facilities, and needs, and to encourage donations, gifts, endowments, and bequests to the library, thereby stimulating increased usage and enhancement of library resources and services, and thus helping enrich the lives of the local community.

## Sample Bylaws

Chapter 3 includes a discussion of the need for bylaws, the elements of bylaws, and some suggestions for Friends groups writing bylaws. Below are two examples of the bylaws for Connecticut Friends groups, the Friends of the Cora J. Belden Library in Rocky Hill and the Friends of the E. C. Scranton Memorial Library in Madison. The FOCL *website at [www.cslib.org/focl](http://www.cslib.org/focl)* contains links to the bylaws of several other Connecticut Friends groups.

Note, in particular, in the Belden bylaws:

- Article II–Purpose—This is essentially the mission statement of the group.
- Article III–Membership—Specific dollar figures are not set, but guidelines for setting dues are.
- Article V–Meetings –The annual meeting is set for “spring,” rather than a specific date, such as, “ the third Wednesday of May at 2 p.m.” Some groups set no date at all, but specify that the executive committee will set the date.
- Article VII–Activities and dissolution. The dissolution clause is required for any Friends group seeking 501(c)3 status.

### **Friends of the Cora J. Belden Library Articles of Association**

#### **Article I Name**

The name of the Association shall be Friends of the Cora J. Belden Library.

#### **Article II Purpose**

##### **Section 1.**

It is recognized that the administration of the Cora J. Belden Library is vested in the town of Rocky Hill through the Town Council, the Library Board of Trustees, and the Library Director.

##### **Section 2.**

The purpose of the Friends shall be to maintain an association of persons interested

in good library service; to increase the facilities and service of the Cora J. Belden Library; and thus to enrich the cultural opportunities available to the citizens of Rocky Hill.

**Section 3.**

The activities of the Association shall include sponsorship of special projects; informing the public of the resources and services of the library, securing materials that are beyond the command of the ordinary library budget, and performing other services deemed helpful to the Library.

**Article III. Membership**

**Section 1.**

Membership in this organization shall be open to individuals, organizations, and businesses in agreement with its purposes.

**Section 2.**

There shall be various categories of membership as determined by the Executive Board. There shall be, at minimum, Household category and a Life Member category. Dues of each category shall be determined annually by the Executive Board prior to the Annual Meeting.

**Section 3.**

Life Membership shall be available to an individual only. Upon payment of the prescribed dues charge for Life Member category, such an individual shall be relieved of payment of dues thereafter.

**Section 4.**

Each member who has paid dues shall be entitled to one vote.

**Article IV Officers**

**Section 1.**

The officers of this Association shall be a President, a Vice President, a Secretary, a Corresponding Secretary, and a Treasurer. The officers of the Association, along with at least two other individuals, shall constitute the Executive Board. The Library Director or designee, shall be an ex-officio member of the Board.

**Section 2.**

The Executive Board shall meet at the call of the President. A majority of the Board shall constitute a quorum.

**Section 3.**

The direction of affairs of this Association shall rest with the Executive Board, the President acting as chairman.

**Section 4.**

The President may appoint chairpersons of standing and ad-hoc committees. Standing committees shall be Membership, Program, Publicity/Public Relations, Finance, and Gifts and Endowments. Other standing or ad-hoc committees shall be formed as deemed necessary, with the approval of the Executive Board.

**Section 5.**

The President is an ex-officio member of all committees with the exception of the Nominating Committee.

**Section 6.**

Nominations for officers and the Executive Board shall be presented by a Nominating committee of at least two, to be appointed by the Board.

**Section 7.**

The officers of the Executive Board shall be elected at the annual meeting.

**Section 8.**

Vacancies arising on the Board shall be filled by appointment made by the remaining Board members.

**Article V Meetings****Section 1.**

This association shall hold its annual meeting in the Spring for the purpose of election of officers, to receive various reports, and to enact other business. Public notice shall be made prior to the meeting.

**Section 2.**

Additional meetings shall be scheduled as recommended by any special committees and approved by the Board.

**Article VI Funds****Section 1.**

Adequate books of account shall be maintained by the Treasurer who shall be responsible thereof.

**Section 2.**

All checks shall be signed by the Treasurer or President.

**Section 3.**

The Executive Board shall appoint an accountant, not an officer, to review the Treasurer's books prior to the annual meeting.

**Section 4.**

No member of this Association shall be liable except for unpaid dues; and no personal liability shall in any event be attached to any member in connection with any of its undertakings.

**Section 5.**

The fiscal year of this Association shall be from July 1 to June 30.

**Section 6.**

One-half of the dues paid by each Life Member shall be held by the Treasurer and shall be expended by the Association.

**Article VII Activities and Dissolution****Section 1.**

Notwithstanding any other provision of these articles, the Association is organized exclusively for one or more of the following purposes: religious, charitable, scientific, testing for public safety, literary, or educational purposes, or to foster national or international amateur sports competition (but only if no part of its activities involve the providing of facilities or equipment) or for the prevention of cruelty to children or animals, as specified in Section 501 (c) (3) of the Internal Revenue Code of 1954.

## **Section 2.**

No substantial part of the activities of the Association shall be carrying on propaganda, or otherwise attempting to influence legislation (except otherwise provided by Internal Revenue Code Section 501 (h), or participating in, or intervening in (including the publication or distribution or statements), any political campaign on behalf of any candidate for public office.

## **Section 3.**

No part of the net earnings of the Association shall inure to the benefit of any member, trustee, director, officer of the Association, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Association), and no member, trustee, or officer shall be entitled to share in the distribution of any of the assets upon dissolution of the Association.

## **Section 4.**

In the event of dissolution of the organization, the assets of the Association shall be distributed for one or more exempt purposes within the meaning of Section 501 (c) (3) of the Internal Revenue Code or corresponding section of any future Federal tax code, or shall be distributed to the Federal Government, or to a state or local government, for a public purpose.

## **Article VIII Amendments**

These Articles of Association may be amended on prior notice at any meeting of this Association, by a three-fourths vote of the members present, provided that notice of the proposed change was provided with all notices of the meeting.

Approved June 14, 2006

# **Friends of the E. C. Scranton Memorial Library Constitution and By-Laws**

## **Article I Name**

The name of this association shall be the Friends of the E. C. Scranton Memorial Library. It shall be a non-profit, non-sectarian, non-political organization.

## **Article II Purpose**

### **Section 1.**

The purpose of the Friends shall be:

- a To foster closer relations between the Scranton Library and the residents of the town of Madison.
- b To promote knowledge of functions, resources, services and needs of the Library.
- c To foster public support for the necessary development of the Library to the end that it may serve adequately the needs of the town.
- d To provide programs and events for the community that are compatible with the Library's policies and objectives.
- e To conduct for and on behalf of the E.C. Scranton Memorial Library the annual funds solicitation.

It is recognized that the responsibility for the administration of the Library's finances and for the establishment of Library policy and objectives is vested in the Board of Directors of the corporation.

### **Article III Membership**

#### **Section 1.**

All persons who donate funds or services to the Library, during the current fiscal year, shall be considered members of the Friends, for that year.

### **Article IV Officers**

#### **Section 1.**

The officers of the Friends shall be an Executive Board which shall consist of a President, a Vice-President, a Secretary and a Treasurer, and at least three Members-at-Large and the Executive Librarian as an ex-officio member.

### **Article V Funds and Liability**

#### **Section 1.**

Activities of the Friends shall be self-supporting. All funds accrued by the Friends organization shall be deposited to the account of the Friends of the E.C. Scranton Memorial Library and shall be disbursed by the Treasurer of the Friends as authorized by the Executive Board of the Friends, to be used for the purposes of the Library. Disbursement of all sums over \$100 shall be subject to the approval of the Executive Librarian and/or the Board of directors of the E.C. Scranton Memorial Library.

#### **Section 2.**

No personal liability shall in any event be attached to any member of this association in connection with any of its undertakings.

#### **Section 3.**

In the event of the dissolution of the Friends, all funds shall be disbursed to the E.C. Scranton Memorial Library.

## **By-Laws**

### **Article I Meetings**

#### **Section 1.**

The friends shall meet annually on a date set by the Executive Board for election of officers and transaction of other business.

#### **Section 2.**

Regular meetings shall be held whenever scheduled by the President or other duly constituted authority of this association.

#### **Section 3.**

A special meeting of the Friends may be called at any time by the President or by two members of the Executive Board.

#### **Section 4.**

Fifteen members present and voting shall constitute a quorum for transaction of business of the association at all general membership meetings of the association.

**Section 5.**

At least one week prior to all general membership meetings, a notice shall be placed in a newspaper having general distribution in Madison and in the Library.

**Section 6.**

A written record of all meetings of the Executive Board and the Friends shall be maintained by the secretary, and a copy given to the Executive Librarian.

**Section 7.**

The rules contained in Robert’s Rules of Order Revised shall govern all proceedings of the association, the Executive Board and Committees.

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**Section 1.**

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- e To conduct for and on behalf of the E.C. Scranton Memorial Library the annual funds solicitation.

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Activities of the Friends shall be self-supporting. All funds accrued by the Friends organization shall be deposited to the account of the Friends of the E.C. Scranton Memorial Library and shall be disbursed by the Treasurer of the Friends as authorized by the Executive Board of the Friends, to be used for the purposes of the Library. Disbursement of all sums over \$100 shall be subject to the approval of the Executive Librarian and/or the Board of directors of the E.C. Scranton Memorial Library.

**Section 2.**

No personal liability shall in any event be attached to any member of this association in connection with any of its undertakings.

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**Section 7.**

The rules contained in Robert's Rules of Order Revised shall govern all proceedings of the association, the Executive Board and Committees.

### **Article II Election and Duties of Officers**

**Section 1.**

All officers shall be nominated and elected at the annual meeting from a slate presented by the Nominating Committee and/or by nominations from the floor and shall serve without compensation. The term of officers so elected shall begin with the annual meeting and continue for a period of one year, or until their successors are chosen.

**Section 2.**

The President and Vice-President shall be eligible for a second consecutive term, but not for a third consecutive term in the same office.

**Section 3.**

The Officers of the Friends shall be nominated by a committee of 4 persons, 2 from the Executive Board and 2 from the general membership, to be named by the Executive Board.

**Section 4.**

A vacancy in any office shall be filled for the remainder of the term through appointment by the Executive Board with exception as stipulated in Article II, Section 7 (b) of the by-laws.

**Section 5.**

The Executive Board shall manage the affairs of the Friends during the intervals between annual, special or regular meetings.

**Section 6.**

The duties of the officers shall be:

- a The President shall preside at all meetings of the association and of the Executive Board. This person shall be the Chief Executive of the association and shall direct the administration of the business of the association with the advice and consent of the Executive Librarian and the Library Board of Directors. The President shall be an ex-officio member of all committees.
- b The Vice-President shall act in his absence at all meetings of the association, of the Executive Board and of the Committees. In the event of the resignation, incapacitation or death of the President, the Vice-President shall then become President for the remainder of that term of office.
- c The Secretary shall be responsible for keeping all records, minutes and correspondence of the association, except financial records.
- d The Treasurer shall, as required by the Executive Board, collect all dues, assessments, and other receipts, make disbursements and keep such records as are ordinarily required by that office.
- e The Members-at-Large shall assist in the administration of the association.

**Section 7.**

All Officers and Committee Chairmen shall deliver to their successors, immediately upon relinquishing office, all records, correspondence and other properties belonging to the association.

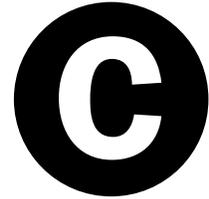
**Article III Committees****Section 1.**

The Executive Board may authorize committees consistent with the purposes and resources of this association.

**Article IV Amendments****Section 1.**

Amendments to the constitution and By-Laws may be made at any meeting of the general membership by a two thirds vote of those present, after a notification of at least one week prior to the meeting at which voting is to take place.

Prepared by the Division of Library Development, Connecticut State Library, 12-97.



## Sample Membership Forms

**B**elow are samples of membership forms from Connecticut libraries. The most effective membership forms include not only the application itself, with several categories of memberships offered, but also include a list of volunteer opportunities. Include a check off section for members to indicate their areas of interest.

Feature the Friends mission statement prominently. On brochures, give specific examples of what Friends efforts have produced for the library and the community at large. Mention not only the dollars raised, but also the new services and new and improved collections. Groups might also indicate how many volunteer hours were provided for the library.

Many Friends groups also post their membership forms on the library web page. For an example see the Friends of the Westport Public Library form [www.westportlibrary.org/about/friends/friendsmemberform.html](http://www.westportlibrary.org/about/friends/friendsmemberform.html).

**FRIENDS OF THE  
FAIRFIELD PUBLIC LIBRARY  
MISSION STATEMENT**

THE MISSION OF THE FRIENDS OF  
THE FAIRFIELD PUBLIC LIBRARY IS TO  
ENHANCE THE PARTNERSHIP BETWEEN THE  
FAIRFIELD PUBLIC LIBRARY AND THE COMMUNITY,  
AND TO ADVOCATE FOR QUALITY LIBRARY SERVICE  
FOR ALL OF THE PEOPLE OF  
THE TOWN OF FAIRFIELD

**REASONS TO JOIN  
FRIENDS OF THE  
FAIRFIELD PUBLIC LIBRARY**

Support children's, young adult, and adult  
reading programs and services

Assist the library with buying more of the  
latest books, videos, CDs, and DVDs

Meet others who love books and the library  
as much as you do

Join in the fun with Friends' projects

Be part of this Library's vision for the future

Touch the lives of people in our community

Friends of the Fairfield Public Library, Inc.  
1080 Old Post Road  
Fairfield, CT 06624  
203-256-3155  
[www.FairfieldPublicLibrary.org/friends.htm](http://www.FairfieldPublicLibrary.org/friends.htm)



FAIRFIELD, CONNECTICUT

**ANNUAL  
MEMBERSHIP  
APPEAL**

**FRIENDS OF THE  
FAIRFIELD PUBLIC LIBRARY**

The Friends of the Fairfield Public Library is a non-profit volunteer organization dedicated to enhancing the partnership between the Fairfield Public Library and the community and advocating for quality library service.

Our purpose is to promote the use and enjoyment of the library as a center for lifelong learning and a community hub; to focus public attention in a positive manner on library services, facilities, resources, functions and needs; to support Library programs and events; and to aid in the raising of supplemental funds for the Library.

Since its formation in 2003, the Friends have seen the renovation and transformation of the Main Library into a state-of-the-art facility that will serve the community of Fairfield for many years to come. The Friends offer an opportunity to play a vital role in the continued success of both the Main Library and Fairfield Woods Branch Library.

**FRIENDS MAKE A DIFFERENCE  
Connecting People ■ Building Community**

The Friends of the Fairfield Public Library have purchased many new services including the outfitting of the Birth-to-Three "Little Farm" in the Children's Library at the Main Library and the Teen Space at the Main Library.

Friends sponsored programs include: Book discussions with renowned local authors, *Moments that Last*, and art exhibitions and receptions in the Bruce S. Kensler Gallery at the Main Library.

**MEMBERSHIP**

Over 800 people joined the Friends in its first year, making it one of the largest and most successful Friends groups in Connecticut.

The generous financial contributions of our members help support supplemental programs and services for the library. Many members also make invaluable contributions assisting in the facilitation of on-going programs and events.

Membership in the Friends of the Fairfield Public Library is open to individuals, organizations, and small businesses that value the services of the Fairfield Public Library. Member benefits include receiving the Fairfield Public Library's bi-monthly newsletter and announcements of all library programs and events.

If you have questions regarding membership in the Friends of the Fairfield Public Library, please call the library at 256-3155 or visit:

[www.fairfieldpubliclibrary.org/friends.htm](http://www.fairfieldpubliclibrary.org/friends.htm)

**Your membership dollars contribute to the  
offerings and spirit of our Library.**

**It is no wonder the Fairfield Public Library is one  
of the best-rated public libraries in the nation.**

**Please join the Friends community today!**

The Friends of Fairfield Public Library is a registered 501(c)(3) organization and all contributions are tax deductible to the fullest extent of the law

**Friends of the Fairfield Public Library  
ANNUAL MEMBERSHIP FORM**

I would like to join or renew in the following category:

- Senior/Student/Military/Library Employee ... \$10
- Individual ..... \$25
- Family ..... \$40
- Organization/Small Business ..... \$90
- Patron ..... \$100
- Other ..... \$\_\_\_\_\_

Enclosed is a matching gift form from my employer

I prefer my donation to remain anonymous

**Yes, I would like to be an active member:**

- Volunteer Activities
- Fundraising Events
- Membership Committee
- Children and Teen Committee
- Fairfield Woods Branch Committee
- Art Gallery Committee
- Program Committee

Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Email \_\_\_\_\_  
 Phone \_\_\_\_\_

Please detach form and send with your check payable to:

Friends of the Fairfield Public Library  
 1080 Old Post Road, Fairfield, CT 06824

**Your support is greatly appreciated!**

**Please mail this application to:**

Friends of Fergusson Library  
One Public Library Plaza  
Stamford, Connecticut 06904

Memberships are annual by calendar year. Memberships received after September 1st of each year will be applied to the membership year beginning the following January 1st.

**Yes, I would like to Volunteer for:**

- Used Book Shops—Sales
- Used Book Shops—Sorting Books
- Mailings
- Other (Please Specify) \_\_\_\_\_

The Friends of Fergusson Library is a not-for-profit organization. Your gift is tax deductible to the extent provided by federal law.

**Ten Good Reasons to Join the FRIENDS**

1. Support children's, adult, and young adult reading programs.
2. Assist the library with the purchase of the latest books, videos, and DVDs.
3. Sponsor the Books for Babies Program.
4. Help fund literacy programs.
5. Help sponsor a wide variety of valuable library programming.
6. Receive advance notice of special events.
7. Meet others who love books as much as you do.
8. Receive discounts on Used Book Shop purchases, Starbucks (Main Branch), and more.
9. Be a part of this library's vision for the future.
10. Know that your contribution will touch the lives of people in our community.

Join the  
**FRIENDS**  
of  
**FERGUSON**  
**LIBRARY**



THE FERGUSON LIBRARY  
Stamford's Public Library  
One Public Library Plaza  
Stamford, Connecticut 06904  
203-964-8000 x 275  
[www.friendsoffergusonlibrary.org](http://www.friendsoffergusonlibrary.org)

## Who are the Friends of Ferguson Library?

The Friends of Ferguson Library is a not-for-profit organization established in 1979. Our purpose is to encourage and promote community participation and support for the activities and programs of the Ferguson Library and to assist in the Library's growth and development.

Through membership, donations, used book sales and volunteerism, the Friends of Ferguson Library help support library activities for all ages, including the children's and adult summer reading programs, Literacy Labs, and Library Art Exhibits. Our continued support provides for materials, equipment, and books that would not otherwise be funded.

The Friends also organize many wonderful events throughout the year, including special book sales and the Book & Author Luncheon.

Membership in the Friends of Ferguson Library is open to all interested people, organizations, and businesses.

## How Can I Help?

By becoming a member, donating, or volunteering your time and talents. Kindly fill out and return the form provided.

## Membership Benefits

Joining the Friends entitles you to Basic Membership items and provides support for the many library events and programs.

- Friends of Ferguson coffee mug or Friends of Ferguson tote bag
- 10% Discount at the Friends Used Book Shops
- 10% Discount at Starbucks (Main Branch location only)
- Special Membership Sticker to place on Library Card
- Special discounts and notices throughout the year

**Basic Membership (\$25/\$35)  
Patron (\$50)  
Sponsor (\$100)  
Good Friend (\$250+)**

## Membership Application

### Payment

- Check enclosed (payable to Friends of Ferguson Library)  
 Charge  Visa  MasterCard

Credit Card # \_\_\_\_\_  
 Exp. Date \_\_\_\_\_  
 Print Name as it appears on the card: \_\_\_\_\_

### Signature

\_\_\_\_\_

- New Member  Renewal
- Senior Couple (\$25)  
 Individual (\$25)  
 Family (\$35)  
 Patron (\$50)  
 Sponsor (\$100)  
 Good Friend (\$250+)

# of Membership stickers \_\_\_\_\_

- I have included a matching gift form from my employer.  
 I do not want to be a Member, but enclose a donation for \$ \_\_\_\_\_

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 E-mail: \_\_\_\_\_



## Glossary

**B**elow is glossary of library acronyms and terms that may be helpful to Friends as they attend meetings and participate in discussions.

**ACLB** **Association of Connecticut Library Boards** An organization for the trustees of public libraries in the state. ACLB sponsors workshops and meetings for trustees.

**ACLPD** **Advisory Council for Library Planning and Development** An advisory committee to the State Library Board. May create Task Forces to work on specific projects.

**AENGLC** **Adjusted Equalized Net General List per Capita** Pronounced Angelic by some, this ranks Connecticut's cities and towns from 1 to 169 by average per capita wealth and is included in the CSL statistical tables.

**ALA** **American Library Association** The oldest and largest organization of librarians and libraries in the country, with over 30,000 members. ALA provides leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all.

**Bibliomation** A network of libraries in Connecticut using the CARL system to provide circulation, public access catalogs, and ILL.

**CDL** **Connecticut Digital Library** A collection of online databases and other materials administered by the CSL and available to anyone with a Connecticut Library card. Also called **iCONN**.

**CECA** **Connecticut Educators Computer Association**

**CEMA** **Connecticut Educational Media Association** An association of media specialists and school librarians.

**CEN** **Connecticut Education Network** DOIT project to develop a new state of the art communications network to connect all public K-12 schools, public and private higher education and library locations throughout Connecticut

**CHC** **Connecticut Humanities Council** Provides funding for humanities projects such as book discussions, films, concerts, and lectures.

**CLA Connecticut Library Association** An association for all Connecticut librarians. Sponsors workshops and an annual conference; provides support for librarians in various areas such as minimum salary guidelines and censorship challenges. CLA's annual Legislative Agenda lobbies for support for library legislation and funding.

**CLC Connecticut Library Consortium** Formed in July 2003 from the merger of the four CLSUs, CLC is a statewide nonprofit membership organization for public, academic, school, and special libraries providing networking, communications, cooperative purchasing, training, and other services.

**CLSU Cooperating Library Service Unit** Formerly, one of four nonprofit membership organizations serving public, academic, school, and special libraries. Each CLSU served libraries in a specific region. In July 2003 the four CLSUs merged to become the statewide CLC.

**CONNECT** See **Library Connection**.

**Connecticar** Delivery system for public and academic libraries, operated by the State Library to deliver materials for interlibrary loan and Connecticard returns. Also known as "C-car."

**Connecticard** Statewide public library lending program, which allows Connecticut residents to use their local public library, cards in all public libraries in the state.

**CONSULS Connecticut State University Library System**

**CSL Connecticut State Library** The principal library of state government, specializing in law, history, government publications, and public policy. Includes Public Records Administration, the State Archives, and the Museum of Connecticut History. The Division of Library Development provides services and consultants to libraries in the state. State Librarian: Kendall Wiggin.

**DLD Division of Library Development** Connecticut State Library

**DOIT Connecticut Department of Information Technology**

**FOCL Friends of Connecticut Libraries** Statewide organization of Friends of the Library groups.

**FOCL-Forum** Electronic discussion list for Friends of the Library in Connecticut

**FOCLPOINT** Newsletter of the Friends of Connecticut Libraries

**FOL** Friends of the Library

**FOLUSA Friends of Libraries USA** The national organizations for Friends groups.

**Gnm Goodnightmoon** The electronic discussion list for children's services staff in CT public libraries

**ILL Interlibrary Loan** The process by which a library requests material from, or supplies material to, another library upon the request of a library user.

**IMLS** **Institute of Museum and Library Services** Federal grant-making agency that promotes leadership, innovation, and a lifetime of learning by supporting the nation's museums and libraries. It administers LSTA funds.

**LBPH** **Library for the Blind and Physically Handicapped** A unit of the Connecticut State Library

**LEAP** **Library Exchange Aids Patrons** The automated circulation system in south central Connecticut.

**Library Connection** Integrated (SIRSI) library system shared by 26 libraries in central Connecticut, formerly CONNECT

**LION** **Libraries ONline** A group of libraries in southern and eastern Connecticut using a shared automated system.

**LSTA** **Library Services and Technology Act** Federal funding for libraries in several areas—technology, interlibrary cooperation, literacy, etc., and for state library agencies. Replaces LSCA—Library Services and Construction Act.

**MLS** **Master's Degree in Library Science** ALA accredits MLS programs in the U.S.

**MLSC** **Middletown Library Service Center** A branch of the Connecticut State Library that provides services to public and school libraries.

**NELA** **New England Library Association** An association of librarians from all types of libraries in New England. Special interest divisions, workshops, and an annual conference.

**reQuest** Connecticut statewide library catalog

**SLB** (Connecticut) State Library Board

**WebJunction Connecticut** The Connecticut version of the WebJunction website, an online community where library staff meet to share ideas, solve problems, and take courses for professional development. Resources from DLD are included here at [ct.webjunction.org](http://ct.webjunction.org)

**WLSC** **Willimantic Library Service Center** A branch of the Connecticut State Library that provides services to public and school libraries.

This glossary was originally developed by Anita Barney of the CLSU's and updated by the State Library's Division of Library Development.





# Resources for Forming Friends Groups

## A Basic List

Following is a selective list of resources on organizing Friends of the Library. Each of the organizations has a wealth of materials available and a website that is very useful both for new groups and those that are up and running. The list of printed materials includes core resources for Friends.

In addition to their website, the Friends of Connecticut Libraries maintains an extensive library of printed material that is available for loan. FOCL also maintains a resource file, open to all members, containing samples of membership forms, brochures, bylaws, etc. They also have available information about other Friends activities, including fundraisers, book sales, and membership campaigns.

## Websites

**Connecticut Association of Nonprofits.** [www.ctnonprofits.org](http://www.ctnonprofits.org). A trade organization whose mission is to support and strengthen nonprofit organizations in building and sustaining healthy communities in Connecticut. The association offers resources, training, and links to outside businesses such as insurance firms specializing in serving nonprofits.

**Connecticut Council for Philanthropy.** [www.ctnonprofits.org](http://www.ctnonprofits.org). A resource for networking, news and information on grant making and philanthropy in Connecticut. Their website includes guidelines for “Organizing and maintaining a nonprofit corporation in Connecticut.” The guidelines provide step-by-step instructions for incorporation, applying for nonprofit status, and other legal filings.

**Foundation Center.** [www.foundationcenter.org](http://www.foundationcenter.org). Authoritative source of information on private philanthropy in the United States for grant seekers, grant makers, researchers, and policymakers. Their website offers tutorials on many topics, including “Establishing a Nonprofit Corporation.”

**Friends of Connecticut Libraries.** [www.cslib.org/focl](http://www.cslib.org/focl). FOCL is the number one resource for Friends groups in Connecticut. (See Chapter 1). FOCL website provides membership information, calendars, information on activities and services, and links to other library resources. Among the features are resources and information on forming and maintaining a local Friends group.

**Friends of Libraries USA. (FOLUSA).** [www.folusa.org](http://www.folusa.org). FOLUSA is a national organization, whose mission is to motivate and support state and local library support groups across the country. FOLUSA provides resources, services, and networking opportunities for Friends, trustees, and foundations across the country to increase and enhance their efforts on behalf of public, academic, and school libraries. Their website includes a series of fact sheets for Friends groups. Membership in FOLUSA entitles Friends to a newsletter and exclusive resources for Friends including “toolkits” for specific topics such as the very useful brochure, “Starting a new Friends group, or revitalizing the group you have.”

## Printed materials

**Corson-Finnerty, Adam and Laura Blanchard.** *Fundraising and Friend-Raising on the Web.* Chicago: American Library Association, 1998. Describes how Friends and other library groups can weave a Web strategy—whether yours is a fledgling Friends group, or you already have a structure in place for major development campaigns.

**Dolnick, Sandy.** *The Essential Friends of Libraries: Fast Facts, Forms, and Tips.* Chicago: American Library Association, 2005. This book delivers vital information into easy bites and combines a new CD, with over 50 easily customized forms, guidelines, and templates.

**Herring, Mark Youngblood.** *Raising Funds with Friends Groups.* Neal-Schuman, 2004. Step-by-step advice on how to form or restructure friends groups in academic and public libraries. He covers establishing and organizing a steering committee, marketing, communicating with your membership one-on-one and via newsletters, advocacy and support, event programming, publicity, affordable feasibility studies, perpetual programs, and more.

**Reed, Sally Gardner, et al.** *101+ Great Ideas for Libraries and Friends.* New York: Neal-Schuman, 2004. FOLUSA has collected and edited over 100 ideas from Friends groups across the country in this book.