



Friends of the Library Handbook

VIRGINIA PUBLIC LIBRARIES



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Introduction

Welcome to the Friends of the Library Handbook! This resource will illustrate the crucial role that Friends groups play in supporting libraries and enhancing the communities they serve. Friends of the Library are supporters, advocates, fundraisers and ambassadors who help libraries thrive in ways that exceed traditional expectations. This handbook serves as your guide to understanding the profound impact of Friends groups and how to harness that power effectively.

The relationship between Friends groups and libraries is deeply symbiotic. While Friends groups provide vital support through fundraising, volunteer efforts, and community outreach, libraries offer the foundation, purpose and strategic vision that inspire these efforts. Together, they create a dynamic partnership reinforcing each other, working toward the shared goal of making the library an indispensable community hub.

This handbook contains practical recommendations and leading practices for your Friends group, whether you are just starting or looking to strengthen your efforts. From establishing a solid organizational structure to developing strategic plans aligned with the library's goals, this resource is designed to help you navigate the challenges and opportunities ahead. By following the insights provided, your Friends group can grow in effectiveness and impact, ensuring your library continues flourishing as a community cornerstone.

As you embark on this journey, remember that your dedication and efforts support the library and enrich the lives of everyone who walks through its doors. Together, Friends and libraries have the power to create lasting, positive change in the community. This handbook is intended as a roadmap to making that vision a reality.

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Chapter 1: Building Your Friends Board

Building a strong Friends Board is essential for the group's success and longevity. It starts by gathering a committed team of library advocates, usually three to five individuals, to form a steering committee. This core group lays the groundwork for establishing the Friends group and may take on leadership roles in the future. After establishment, the board may consist of a larger group, usually between five to seven individuals; this helps spread out the workload and allows for more individual input.



Purpose: The Essential Support of Friends of the Library Groups

Being part of a Friends Board requires a mix of commitment, leadership and teamwork. Each board member has a role in guiding the Friends organization, supporting the library, and engaging the community.

Alignment – Understanding the library's needs and aims is critical for board members. Achieving this begins with building strong relationships with key stakeholders, such as library liaisons, library leaders and patrons. Consistent and open communication with these groups ensures that the Friends' initiatives align with the library's mission and enhance its offerings. Board members must be well-informed about the library's operations to ensure that Friends' activities align with its policies and strategic goals. This understanding helps the Friends operate within the library's boundaries while effectively supporting its mission and long-term objectives.

Leadership – The core team, comprising the president, vice president, secretary, treasurer and others, must collaborate effectively to steer the organization. The president usually leads in setting agendas, conducting meetings, and publicly representing the Friends. The vice president supports these efforts and steps up when necessary. The secretary maintains records about meetings and decisions and other communications, while the treasurer handles group finances to promote transparency and accountability.

Governance – Collaborating with library leadership, board members collectively establish group objectives like fundraising initiatives, advocacy work and program support. They are responsible for guiding the direction and ensuring the achievement of the group's goals. This involves creating and following bylaws that outline the group's structure, membership criteria and meeting protocols. Additionally, board members play a role in recruiting and retaining members, which fosters a sense of community and purpose.

Fundraising – Fundraising is a key responsibility of board members, who may coordinate events, manage donations and book sales, seek grant opportunities, and contribute their time, talent, network and advocacy — essential elements of philanthropy — to support the library’s mission and growth. Through these efforts, they raise funds and enhance awareness about the library’s importance in the community. Collaborations with businesses, schools and other entities are often pursued to broaden the Friends’ reach and impact.

Communication – Board members must communicate effectively. They must execute a communication strategy that effectively promotes the Friends’ mission and initiatives. This could involve utilizing social media platforms, local newspapers and community bulletin boards to attract members and inform the public about the Friends’ endeavors.

Advocacy – Friends Board members are expected to engage with the community by participating in events and advocating for the library’s value. Their involvement helps establish a bond between the library and its supporters, creating a nurturing environment for its growth and sustainability.

Sustainability – Finally, board members should prioritize the Friends organization’s viability. This includes preparing for leadership changes, promoting volunteerism, and consistently assessing the group’s initiatives to guarantee they continue to be impactful and align with the library’s changing requirements.

Through their dedication and active involvement, Friends Board members play a crucial role in enhancing library services and strengthening community well-being.

What Skills Should They Have?

Central to this effort is recruiting individuals who understand the commitment required for the Friends role. It involves operating as a 501(c)(3) organization and serving as the library’s vital fundraising and advocacy arm. Launching and maintaining this endeavor demands time, dedication and substantial effort. Those chosen for leadership roles will collaborate closely with the library’s staff and trustees to shape its future. Therefore, the Friends should consider several key attributes and skills when identifying potential new board members.

- **Passion for Libraries** – A genuine love for libraries and understanding of their importance to the community.
- **Leadership Skills** – Ability to guide, inspire and motivate others effectively.
- **Communication Skills** – Strong skills for articulating the Friends group’s mission and goals, internally and externally.
- **Collaboration and Teamwork** – Ability to work closely with library staff, stakeholders and fellow board members.
- **Organizational Expertise** – Skills for planning events, managing finances, and overseeing projects.
- **Fundraising Experience** – Experience in fundraising or a willingness to actively participate in fundraising efforts.
- **Financial Literacy** – Knowledge to contribute toward budgeting, financial planning and accountability.
- **Strategic Thinking** – Skills to support long-term planning and organizational growth.

- **Networking Skills** – Ability to build relationships within the community to support the Friends’ initiatives.
- **Advocacy Skills** – Ability to promote the library’s interests and engage local government officials or community leaders.
- **Event Planning Expertise** – Experience in organizing successful programs, activities and events.
- **Problem-Solving Abilities** – Experience in addressing challenges effectively and finding practical solutions.
- **Flexibility and Adaptability** – Ability to navigate fundraising and community engagement changes.
- **Commitment to Community Representation** – Desire to create an environment that welcomes people of all backgrounds and perspectives.

It’s essential to recognize that no single candidate will possess every skill or quality needed for the Friends Board. This is why recruiting members from varied parts of the community is essential. A board of individuals with varied backgrounds, perspectives and expertise strengthens the organization in several ways. For example, it fosters better decision-making and innovation, helps effectively tackle challenges, and enhances the Friends’ ability to represent and support the library’s robust community.

Collaboration and shared strengths enable board members to work together toward the common goal of advocating for and supporting the library. Through this collective effort, the organization also fosters skill-building and opportunities for personal growth among its members, enhancing their ability to contribute meaningfully. Each member brings unique insights that ensure the library remains an essential part of the community.

Beyond specific skills, it is equally important to consider an understanding of nonprofit organizations’ legal and ethical responsibilities and the availability and willingness to commit time to board duties. To ensure a strong match, interviews or informal meetings with potential board members provide the opportunity to assess skills and personal qualities. This step ensures alignment with the values and mission of the Friends group.

By prioritizing a multitude of perspectives, a shared commitment to the mission, and thoughtful recruitment practices, the Friends can build an effective and resilient board capable of helping the library thrive.

Roles & Responsibilities

As valued Friends Board members, individuals play many roles and carry out various tasks to uphold and promote the organization’s goals. Here is a breakdown of their primary responsibilities:

- Lead and govern effectively
- Advocate for the library and engage with community stakeholders
- Contribute to fundraising activities
- Interact with residents
- Work closely with library staff and community collaborators
- Manage finances responsibly
- Plan and organize Friends events without duplicating library offerings

- Ensure adherence to governance regulations
- Attend and actively participate in board meetings
- Ensure that the goals of the Friends align with the goals of the library

Board Recruitment

Recruiting new members for the Friends Board is essential to keep the organization vibrant and robust. Bringing fresh viewpoints and a range of skills can inject new energy into the group, introduce creative approaches to fundraising and community involvement, and address evolving demands and obstacles. Having new board members also allows for a more balanced workload, reduces strain on current members, and guarantees that the organization stays dynamic and efficient in fulfilling the library's objectives. Recruiting new Friends Board members could involve these steps:

- **Identify Potential Candidates** – Look for people who care about libraries and community service, and cultivate interest by highlighting the impact they can make on the library and the community.
- **Explain the Role** – Tell them what being a board member involves and how it helps the library and community. Having a job description that they can view and take with them is helpful. [See Appendix A]
- **Ask Current Supporters** – Talk to existing Friends members or volunteers who might want to join the board.
- **Use Networking** – Spread the word on social media, at events and through local groups. Ask current members to tell others.
- **Hold Informational Sessions** – Host meetings where interested people can learn about the board. Let them ask questions and meet current members.
- **Reach Out Directly** – Contact potential candidates by email, phone or in person. Explain why their skills would be valuable.
- **Embrace Community Representation** – Aim for a robust board with members from different backgrounds. Everyone's voice matters.
- **Support New Members** – Offer training and guidance to help new board members feel confident in their roles.

Officer Duties

Friends Board officers guide and manage the organization. Each officer typically has specific duties and responsibilities that contribute to the overall success of the Friends group. Here's an in-depth look at what each officer on a Friends Board does:

ESSENTIAL ROLES

These positions are vital for the smooth functioning of the Friends.

- **President** – Guides and directs the board, manages inter-board relationships, leads meetings, collaborates on strategic planning aligned with the library's goals, and represents the Friends in external engagements and partnerships.
- **Vice President** – Supports the president as needed, manages committees and events, and leads special projects or initiatives as directed.

- **Secretary** – Maintains detailed records of meetings and important documents, manages official correspondence, and informs board members and stakeholders about upcoming meetings.
- **Treasurer** – Oversees the Friends' financial matters, including banking, budgeting, reporting and fundraising, to ensure sound accounting practices and regular updates to the board.

EXPANDED ROLES

These positions would benefit from a dedicated person. If this is not possible, however, the items listed below fall within the general purview of the entire Friends Board. If there is no dedicated board member, the various duties can be assigned based on alignment with essential roles and according to individual interests.

- **Membership Coordinator** – Creates strategies to attract and engage new members, maintains accurate records, and keeps members informed and involved through regular communication and welcoming programs.
- **Public Relations Officer** – Develops and implements marketing strategies, manages media relationships and social media presence, and builds community connections to enhance the Friends' visibility.
- **Event Coordinator** – Plans and organizes Friends events, book sales and programs by handling logistics, coordinating with library staff to avoid duplication of efforts, managing volunteers, and assessing success to recommend future improvements.
- **Fundraising Chair** – Develops and executes fundraising strategies, including grant applications, donor relations and sponsorships, while collaborating with the library director and treasurer to align efforts with financial targets.
- **Volunteer Coordinator** – Creates and implements volunteer recruitment and retention plans, conducts training and orientation, organizes recognition events, and maintains open communication to address volunteers' needs.
- **Immediate Past President (if applicable)** – Advises the president and board with historical context, offers continuity, and contributes to assigned projects or initiatives based on past experiences.

As board members carry out their responsibilities, acting transparently and ethically is crucial. Each Friends group has unique needs, so officers must collaborate, communicate well, and work toward shared goals. Regular training helps them fulfill their duties effectively. At the same time, it's essential to identify and handle conflicts of interest to ensure fairness in decision-making and protect the Friends' integrity.

Committees

Just as there may be expanded roles for the board, as the Friends group grows, it may be supported by additional specialized committees that contribute to the organization's success in distinct ways. Committees can comprise additional Friends members who do not sit on the Friends Board. Each committee should include a board liaison so that the full board is aware of the committee's activities. Committees may be long-standing or ad hoc as necessary and may include, but not be limited to, the following:

- Membership
- Fundraising
- Friends Event Planning
- Public Relations & Marketing
- Volunteer Coordination

- Advocacy & Community Outreach
- Technology & Website
- Scholarship & Awards
- Strategic Planning
- Community Representation

Together, these committees address the multiple facets of the Friends group operations, creating a well-rounded and impactful organization. This structure facilitates more leadership opportunities within the broader membership and helps distribute resources and responsibilities more equitably, preventing the board from becoming overwhelmed by the workload.

Conflicts of Interest

Conflicts of interest can affect an organization's integrity, potentially compromising trust and fairness. It's important to recognize that conflicts of interest may arise naturally in any organization. A Conflict of Interest Policy [see Appendix B] helps identify, disclose and address these situations among board members, officers and key employees to maintain the organization's integrity and credibility. While most policies don't prohibit conflicts outright, they offer a process for managing them, such as encouraging board members to recuse themselves from decisions. The policy helps ensure transparency and supports sound decision-making by providing clear guidelines.

The policy emphasizes the importance of members promptly and openly disclosing any potential conflicts, whether related to personal relationships or financial interests. It requires annual conflict disclosure statements [see Appendix C] and immediate reporting of new conflicts. By prioritizing transparency, the policy helps build trust and encourages accountability within the organization.

When conflicts are revealed, the policy outlines their management and resolution steps. Members may be required to recuse themselves from specific discussions or decisions to prevent bias, and significant conflicts might necessitate independent reviews or alternative solutions. Confidentiality is maintained throughout the process to safeguard individuals' privacy while ensuring transparency in conflict resolution.

Thorough recordkeeping documents all Friends' actions concerning conflicts of interest, demonstrating the organization's commitment to accountability and ethical behavior. Regular training sessions ensure that members grasp their responsibilities under the policy, reinforcing transparency and integrity in governance.

Regular evaluations and revisions of the policy are essential to maintain its relevance and effectiveness as the organization grows. Adjustments may be necessary to align with evolving circumstances, helping members uphold the organization's values and mission with integrity.

Ethics

Ethics are at the heart of Friends organizations, building trust, credibility and a strong commitment to supporting the library's mission and serving the community. By upholding ethical standards, Friends groups ensure fairness, transparency and accountability in their decisions, helping to strengthen relationships with members, donors and the broader community. Focusing on ethical conduct and integrity not only builds trust but also ensures the group's ongoing success and lasting impact.

An Ethics Statement [see Appendix D] acts as a guiding document, clearly expressing the organization's commitment to doing the right thing and outlining the values that shape its actions. By publicly embracing honesty, integrity and respect in every interaction, a Friends group shows its dedication to maintaining the highest standards of conduct.

Onboarding & Exiting

ONBOARDING

When introducing new members to the Friends Board, it is essential to clearly outline their duties, roles and objectives. A structured onboarding procedure assists members in joining the board, aligning with the group's purpose, and making practical contributions from the beginning. It also nurtures a feeling of belonging and dedication, establishing a base for a productive and cooperative board.

An effective onboarding process for a Friends Board member should encompass an introduction to the organization's mission and objectives, an outline of their responsibilities and roles, and a review of crucial documents such as bylaws and financial reports. Additionally, it should involve a tour of the library facilities, introductions to other Friends Board members and relevant library personnel, and details about upcoming projects and events. It's also important to engage new board members by asking what excites them and where they feel they can contribute significantly. Finally, ongoing support and resources should ensure the new member feels confident, involved and equipped to have a meaningful impact.

EXITING

When a Friends Board member leaves, it's recommended to have an exit interview to learn from their experiences and find ways to improve the organization. This process allows you to understand why they are leaving, hear their feedback on how the board works, and get any advice they have for other board members. It can help with improving operations, showing respect, and keeping good relationships with former members.

A good exit interview should involve discussing why the member is leaving, gathering feedback on their time on the board, and getting ideas for improvement. It should also include a self-assessment, allowing the departing member to reflect on their contributions and growth during their tenure. Additionally, the interview should cover how to pass on their duties, recognize their contributions, and ensure a smooth transition. Recording what is said in the interview can help inform changes to how the board functions and create a better work environment for future members.

You can find an Onboarding Checklist [Appendix E] and an Exit Checklist [Appendix F] in the back of this handbook.

Chapter 2: Working With the Library

A strong partnership between the Friends of the Library group and the public library is crucial for community impact. Effective collaboration involves maintaining regular communication, sharing common goals, and engaging library staff in various activities and decision-making processes. Both parties must collaborate on events, adhere to library policies, and maintain transparency in financial matters. The partnership is strengthened by working on fundraising initiatives and advocacy efforts and providing recognition and training opportunities for staff and volunteers, leading to improved library services and greater community involvement. Various critical elements are essential in making this partnership work.

Memorandum of Understanding (MOU)

A formal agreement known as a Memorandum of Understanding (MOU) ensures a partnership between a Friends group and a public library. This document outlines both parties' roles, responsibilities and expectations, promoting collaboration and preventing misunderstandings. The MOU communication methods and decision-making processes are established, detailing how the Friends group will assist in achieving the library's objectives while adhering to library policies. By documenting these commitments, the MOU ensures consistency and cooperation even amid personnel changes, fostering a mutually beneficial relationship between the two entities. This agreement addresses financial and operational matters and promotes transparency and accountability, resulting in more impactful support for the library's services and programs. Essential items in the MOU may include:

- Purpose of the Document
- Objectives of the Collaboration
- Roles & Responsibilities of Each Party
- Communication
- Financial Arrangements (donations, fundraising, etc.)
- Events & Programs (regulations for joint events and programs)
- Resource Sharing (including physical space, materials, equipment, etc.)
- Confidentiality
- Terms & Termination
- Amendments

Expanded items could include:

- Performance Metrics (fundraising efforts, program attendance, etc.)
- Intellectual Property
- Marketing & Promotion
- Liability & Insurance
- Dispute Resolution
- Exit Strategy Procedures
- Training & Capacity Building
- Evaluation & Review

- Commitment to Community Representation
- Technology & Data Management
- Community Feedback Mechanism
- Sustainability Practices

See Appendix G for a sample Memorandum of Understanding (MOU) between a Friends of the Library group and the library.

Library Liaisons

Building strong relationships between the library and the Friends is essential for fostering effective collaboration and achieving shared goals in fundraising and support efforts. To promote practical and strategic cooperation, it is recommended that the following liaison positions be established:

- Friends Board Member Liaison to the Library Board
- Library Board Member Liaison to the Friends Board
- Staff Liaison to Both – typically the library director or their designee

These liaison roles are typically non-voting positions focused on building communication and fostering collaboration rather than directly influencing board decisions. Liaisons are vital links, ensuring clear and consistent communication between the Friends and the library. They help align priorities by facilitating the flow of information and providing updates on initiatives. By participating in board meetings, liaisons gain insights into the library's strategic goals, current focus areas and ongoing projects, equipping the Friends better to tailor their support to the library's evolving needs.

This structured collaboration helps prevent duplication in fundraising and community engagement efforts, allowing resources to be used efficiently and effectively. Liaisons also promote transparency by keeping all parties informed of the Friends' activities and the library's plans. Strengthening these connections builds trust and fosters cooperation, enabling the Friends to amplify their impact and support the library's growth and success.

Who Does What?

Understanding the roles and responsibilities of the library director, the library's Board of Trustees and the Friends group is essential to prevent conflicts due to overlapping work. The chart on the following page provides some guidelines to clarify who does what.

***Note:** No trustee should be serving on the Friends Board at the same time they are serving as a library trustee and vice versa. This is considered a conflict of interest.

The table on the following page is modified from the Roles and Responsibilities Guidelines document (2018), which the Connecticut State Library, the Connecticut Library Association, the Association of Connecticut Library Boards, and the Friends of Connecticut Libraries jointly created.

Roles & Responsibilities Guidelines			
	Library Directors	Library Trustees – The information below reflects a governing board; an advisory board would assist the governing body in the tasks listed below.	Friends
General Administrative	Administer daily operations of the library, including personnel, collection development, fiscal, physical plant and programmatic functions. Act as advisor to the board and provide support to the Friends and community groups.	Recruit and employ a qualified library director; maintain an ongoing performance appraisal process for the director.	Support quality library service in the community through fundraising, volunteerism and serving as advocates for the library
Policy	Apprise the board on new policies and policy revisions. Implement the library's policies as adopted by the Library Board.	Identify and adopt written policies to govern the library's operation and program.	Support the library's policies as adopted by the Library Board.
Planning	Coordinate and implement a strategic plan with the board, Friends, staff and community.	Ensure that the library has a strategic plan with implementation and evaluation components.	Provide input into the library's strategic plan and support its implementation
Fiscal	Prepare an annual budget for the library.	Seek adequate funds to carry out library operations. Assist in the preparation and presentation of the annual budget.	Conduct fundraising to support the library's mission and strategic initiatives.
Advocacy	Promote the library's mission within the community. Educate the board, Friends and community regarding local, state and federal issues that impact the library.	Promote the library's mission within the community. Advocate for the library to legislators.	Promote the library's mission within the community. Advocate for the library to legislators.
Meeting	Participate in board and Friends meetings and ensure a liaison between the board and the Friends and vice versa.	Participate in all board meetings. Appoint a liaison to the Friends Board and become a general member of the Friends.*	Maintain a liaison with the board of trustees.

Staff Involvement with Friends Groups

When library employees interact with the Friends organization, whether as participants or through joint projects, it can bring advantages but may pose potential difficulties. Here are a few of the benefits and possible drawbacks of this involvement:

BENEFITS

- Enhanced Collaboration
- In-Depth Knowledge
- Increased Volunteer Support
- Joint Programming
- Efficient Communication
- Shared Resources

DRAWBACKS

- Perceived Bias
- Role Confusion
- Resource Allocation Conflicts
- Potential for Tension
- Perceived Exclusivity



Explicit guidelines, effective communication channels, and defined responsibilities must be established to overcome obstacles and promote successful teamwork between the library staff and the Friends organization. Maintaining honest communication is crucial for addressing issues and guaranteeing a smooth collaboration between both parties to bolster the library's services and engage with the local community.

Establishing these boundaries will help prevent misinterpretations and improve collective endeavors toward common objectives. Here are some guidelines to follow when staff are involved with the Friends:

- **Defined Purposes and Limits** – Clearly articulate the purposes and limits of library staff involvement in the Friends group. Specify the extent of their role and whether their participation is in an official or personal capacity.
- **Conflict of Interest Policy** – Develop and communicate a robust conflict of interest policy. Ensure that library staff understand the potential for conflicts and how to handle situations where their professional role may intersect with their involvement in the Friends. [See Appendix B for example]
- **Voluntary Participation** – Emphasize that library staff participation in the Friends is voluntary. Avoid any perception of coercion and encourage staff to engage based on their personal interests and commitment to the community. Policies regarding staff participation and/or membership with the Friends will vary from library to library.
- **Clear Job Descriptions** – Develop clear job descriptions for library staff members involved in the Friends. Define their roles, responsibilities and expectations, making it explicit whether they act professionally or voluntarily.

- **Task Assignment** – Assign tasks and responsibilities to individuals based on their expertise and availability. Avoid overwhelming library staff with tasks that could conflict with their primary responsibilities.
- **Leadership Roles** – Library staff should avoid board or committee roles within the Friends to prevent conflicts of interest and maintain clear boundaries between staff duties and volunteer activities. This separation ensures that the Friends remain independent and unbiased supporters of the library's mission.

Establishing clear guidelines, communication channels and well-defined roles enables the Friends to build an effective working relationship with library staff. Regular reviews and updates to these guidelines ensure the partnership remains strong and successful over time.

Chapter 3: Infrastructure



Having all the proper rules and regulations for a Friends of the Library group is essential. Ensuring that documents like the articles of incorporation, bylaws, policies, 501(c)(3) filings, financial reports, etc., are well-written and organized is vital to meeting standards, running smoothly, and operating effectively. These records play a role in decision-making, shaping organizational processes, and promoting the transparency and accountability of the Friends. Good documentation also makes leadership transitions easier, ensuring that the organization can operate efficiently and sustainably in the long run.

Primary Legal Requirements

While becoming a 501(c)(3) nonprofit organization is not required to operate as a Friends group, it is highly recommended. Friends groups that choose to do so must adhere to various laws and regulations to operate legally and effectively. The following are some of the primary legal requirements to keep in mind for Friends groups that currently hold 501(c)(3) status or are considering it. Please note that this list is not exhaustive:

Note: *The Library of Virginia is not providing legal counsel, nor is it the final authority on the laws or regulations that a nonprofit organization must follow. Please consult local legal counsel for expertise. See more on this in Chapter 4: Running the Friends of the Library.*

501(c)(3) Compliance: Virginia nonprofits, to obtain and maintain federal tax-exempt status under IRS Code Section 501(c)(3), must ensure their operations align with federal requirements. This includes adhering to rules regarding political activities, lobbying and reporting.

[<https://www.irs.gov/charities-and-nonprofits>]

Annual Registration and Reporting: Nonprofits must submit a report to the Virginia State Corporation Commission (SCC) for ongoing compliance. Additionally, charitable organizations engaging in fundraising must regularly renew their registration with the Virginia Department of Agriculture and Consumer Services (VDACS).

Articles of Incorporation: These must be filed with the Virginia State Corporation Commission (SCC). Nonprofits should provide details such as the organization's name, purpose, registered agent and other pertinent information. [See Appendix H for example]

Bylaws: These play a role in governing the internal operations of a nonprofit organization. Regardless of 501(c)(3) status, these bylaws must comply with Virginia laws and address structure, roles and procedures. [See Appendix I for example]

Conflict of Interest Policy: Establishing a Conflict of Interest Policy to address and handle conflicts among Friends Board members and/or any employed Friends staff is advised. In Virginia, disclosing and managing conflicts of interest under the law is mandatory. [See Appendix B for example]

Donor Receipts: Nonprofits should issue receipts to confirm donations for tax purposes. Receipts should include the organization's name, donor's name, donation details, date, tax ID, any goods or services provided and a thank-you message. They ensure tax deductibility, transparency and accurate recordkeeping for both parties.

Employees: When hiring someone to work for a Friends group, nonprofit organizations in Virginia must follow state employment laws, such as wage rules, workers' compensation, unemployment benefits, anti-discrimination regulations, etc. Additionally, best practices involve tracking performance evaluations and offering retirement benefits.

Grant Reports: If applicable, ensure compliance with all reporting requirements for received grants and maintain records accordingly.

Independent Financial Audits: These are recommended for all organizations, but required for those with gross annual revenue of at least \$750,000 in the previous year.

Insurance Requirements: Certain types of insurance, such as liability coverage, workers' compensation and Directors & Officers (D&O) insurance for board members, might be needed for a nonprofit's activities.

Local Zoning and Licensing Laws: Nonprofit organizations must follow the zoning laws of their community and acquire permits or licenses for their activities, especially when hosting events, managing facilities, or participating in specific endeavors within the area.

Open Meeting Laws: Nonprofit organizations in Virginia are not explicitly mandated to adhere to the state's open meeting regulations [see Virginia Freedom of Information Act link below]. However, Friends groups should do so given their strong connection to the library, as the public may need help to easily differentiate between the Friends and the publicly supported library. Abiding by open meeting laws is crucial for upholding transparency and building public confidence.

Recordkeeping Requirements: Friends groups must maintain accurate records of their bylaws, financial transactions, board meetings, board of directors and officers, and other significant activities. These records must be accessible for review by the board and, in some cases, by the public or government authorities.

Virginia Charitable Solicitations Act: Under this act, nonprofits seeking donations may need to register with the Virginia Department of Agriculture and Consumer Services (VDACS) for solicitation purposes. This registration ensures that fundraising efforts are carried out transparently and ethically. [<https://www.vdacs.virginia.gov/food-charitable-solicitation.shtml>]

Virginia Freedom of Information Act (FOIA): Nonprofit organizations that receive public funding or carry out government duties may also be subject to FOIA requests, which demand openness in their activities. This may or may not apply to your organization. [<https://law.lis.virginia.gov/vacode/title2.2/chapter37/>]

Virginia Nonstock Corporation Act: This regulates how nonprofit organizations are established, operated and dissolved in Virginia. Nonprofits must adhere to the guidelines outlined in this act, which includes submitting articles of incorporation to the Virginia State Corporation Commission (SCC). [<https://law.lis.virginia.gov/vacode/title13.1/chapter10/>]

Virginia Privacy and Data Protection Laws: Nonprofit organizations must keep records of their financial dealings, meetings held by the board, and other important events. These records should be available for examination by the board members and, in certain instances, by the public or government agencies. Two primary laws in Virginia are the Virginia Consumer Data Protection Act (VCDPA) [<https://law.lis.virginia.gov/vacodefull/title59.1/chapter53/>] and the Personal Information Privacy Act [<https://law.lis.virginia.gov/vacodepopularnames/personal-information-privacy-act/>].

Virginia Sales and Use Tax Exemption: Nonprofits may apply for an exemption from Virginia sales and use tax for purchases to further their mission. This requires an application to the Virginia Department of Taxation. [<https://www.tax.virginia.gov/sales-tax-exemptions>]

Adhering to these laws and rules is crucial to upholding an organization's legal validity, tax-exempt privileges, and reputation in the local community. To guarantee continuous compliance, it's recommended that you seek guidance from legal and tax experts.

Mission, Vision & Values

The mission statement, vision statement and organizational values serve different purposes within Friends groups.

A mission statement lays out the organization's core purpose and objectives, explaining its existence, target audience, and goals for the immediate and long-term future. It guides the organization's actions and decision-making processes, offering a roadmap for planning. The mission statement defines what the organization is currently working toward.

A vision statement, on the other hand, outlines the organization's future state or long-term ambitions. It communicates what the organization aspires to achieve or become over time, painting a broader picture of its future. The vision statement motivates stakeholders by presenting its view of success and steering the organization's strategic direction in the long run. It represents the objective or destination that the organization aims to reach.

In addition to the mission and vision, an organization's values define the principles that guide its behavior, culture and decision-making. Values are fundamental beliefs that influence the organization's actions and stakeholder interactions. They shape how the organization approaches challenges, makes decisions, and supports its goals. While the mission focuses on the present and the vision looks to the future, values set the tone for how the organization operates daily, aligning the mission and vision with ethical standards and internal culture.

A strategic plan derived from the library's goals should translate the Friends' mission, vision and values into actionable steps. This plan, which outlines key actions and guiding principles, ensures alignment with both the Friends' core values and the library's strategic direction. By working in tandem with the library's objectives, the Friends group can enhance its collective impact and further support its mission in the community.

Articles of Incorporation

Articles of incorporation are critical legal documents that help officially establish a Friends group as a corporation under Virginia law. They outline vital details such as the organization's name, purpose, principal office address, and initial board of directors names. Typically, a Friends groups' stated purpose includes things like aiming to support libraries through fundraising, advocacy efforts and volunteer work.

The initial step toward gaining status involves filing these articles with the Virginia State Corporation Commission (SCC). This formalizes the Friends' existence and sets the stage for seeking federal tax-exempt status under Section 501(c)(3) of the Internal Revenue Code. Once incorporated, a Friends group must adhere to the governance structure in its articles and bylaws to ensure compliance with state regulations and internal organizational guidelines.

In essence, articles of incorporation establish a framework for Friends groups in Virginia. They legitimize these groups as recognized nonprofit entities within the state, fostering credibility and accountability and enabling them to engage in fundraising activities and other support for libraries. A sample set of Articles of Incorporation can be found in Appendix H at the back of this handbook.

Bylaws

Regardless of 501(c)(3) status, Friends groups are required to have organizational bylaws. These bylaws serve as a guidebook for the group's operations, ensuring clarity, defining roles, and outlining decision-making processes. They help establish the structure and responsibilities within the organization, promoting smooth functioning and accountability. Bylaws are essential for providing clear guidance and ensuring the group's activities align with its purpose.

ESSENTIAL ITEMS TO INCLUDE

- **Name and Purpose** – Clearly state the organization's name and mission.
- **Membership** – Define eligibility criteria for joining, membership classes (if applicable), and member rights and privileges.
- **Board Structure and Responsibilities** – Specify the roles and responsibilities of board members, officers and committees.
- **Term Length** – Specify the length of terms for board members, including any limits on consecutive terms, to ensure leadership turnover and fresh perspectives.
- **Meetings** – Establish guidelines on meeting schedules and procedures for decision-making during meetings.
- **Decision-Making Process** – Describe voting procedures and mechanisms for addressing conflicts of interest.
- **Financial Management** – Set rules governing budgeting practices, fundraising activities, and financial reporting requirements.
- **Amendment Procedures** – Explain how amendments to the bylaws can be made.
- **Dissolution Clause** – Outline procedures for dissolving the organization and distributing its assets.
- **Non-Discrimination Policy** – Include a policy prohibiting discrimination based on protected characteristics.
- **Conflict Resolution Mechanism** – Define protocols for resolving conflicts within the organization.

- **Records and Documentation** – Specify requirements regarding recordkeeping practices and access to documents.
- **Compliance With Legal Requirements** – Ensure the bylaws meet all legal obligations.
- **Adoption and Review** – Explain how the bylaws are approved and updated.
- **Ethics Statement** – Define ethical standards for members, officers and volunteers, including honesty, integrity, confidentiality and respectful behavior.

Incorporating these elements assists with the Friends group's smooth and transparent operation. It is crucial that all of these aspects also align with the Code of Virginia. A sample set of Bylaws can be found in Appendix I at the back of this handbook.

501(c)(3) Status: Establishment & Maintenance

While not required, it is recommended that Friends groups secure and uphold a 501(c)(3) designation, as it provides significant benefits. Securing and maintaining this status is vital because it offers federal tax-exempt status, allowing the group to operate without paying federal income taxes on its profits. This designation also enhances credibility, which makes garnering donations, grants and other forms of financial support easier because gifts to 501(c)(3) organizations are tax-deductible for contributors. Furthermore, preserving this designation ensures compliance with IRS regulations, which is essential for the organization's ongoing activities and long-term sustainability.

Remember to consult with legal and tax professionals throughout any/or all these processes to ensure compliance with state and federal regulations and to address specific circumstances related to the Friends. See more on consulting legal counsel in Chapter 4: Running the Friends of the Library.

ESTABLISHMENT

- **Research and Eligibility** – Research the eligibility requirements for 501(c)(3) status. Generally, organizations formed for charitable, educational, religious or scientific purposes qualify.
- **Incorporate as a Nonprofit** – Formally incorporate the Friends group as a nonprofit organization at the state level. This typically involves filing articles of incorporation with the state's appropriate agency.
- **Develop Bylaws** – Draft and adopt bylaws that outline the organization's structure, purpose, board of directors and operational guidelines.
- **Apply for an EIN** – Obtain an Employer Identification Number (EIN) from the IRS. This is your organization's unique identifier.
- **Submit Form 1023** – Complete and submit Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code, along with the required fee. This form provides detailed information about the organization's activities, finances and governance. [<https://www.irs.gov/forms-pubs/about-form-1023>]
- **Wait for the IRS Determination** – Await a response from the IRS regarding the 501(c)(3) status. This process may take several months.

MAINTENANCE

- **Annual Reporting** – File annual reports (Form 990 or 990-EZ) with the IRS, providing information on the organization's financial status, activities and governance.
[<https://www.irs.gov/charities-non-profits/annual-filing-and-forms>]
- **Recordkeeping** – Maintain accurate and up-to-date records of financial transactions, board meetings, and organizational activities per IRS guidelines.
[<https://www.irs.gov/pub/irs-pdf/p4221pc.pdf>]
- **Compliance with IRS Guidelines** – Ensure ongoing compliance with IRS guidelines, including restrictions on lobbying and political activities.
- **Board Governance** – Uphold strong governance practices, including regular board meetings, proper documentation, and adherence to the organization's bylaws.

ENDING 501(C)(3) STATUS

- **Voluntary Revocation** – If the Friends group discontinues its tax-exempt status voluntarily, it can submit a letter to the IRS explaining the decision. This is an irreversible process.
- **Final Reporting** – The Friends group must file Form 990 or 990-EZ with the IRS, providing information up to the revocation date.
- **Dissolution** – Develop a plan for the organization's orderly dissolution, including distributing the remaining assets to another tax-exempt organization.

RELAPSED 501(C)(3) STATUS

- **Assess the Situation**
 - *Review the Lapse* – Understand why the 501(c)(3) status lapsed. Common reasons include failure to file required annual reports (Form 990 or 990-EZ) or other compliance issues.
 - *Evaluate Impact* – Assess the lapse's impact on the organization, including potential consequences for donors, tax-exempt status, and grant eligibility.
- **Resolve Compliance Issues**
 - *File Outstanding Reports* – Immediately file any outstanding annual reports (Form 990 or 990-EZ) with the IRS. This includes filing for the years when the reports were missed.
 - *Address Compliance Concerns* – Correct any compliance issues that contributed to the lapse and ensure that the organization fully complies with IRS regulations.
- **Reinstate 501(c)(3) Status**
 - *Submit Retroactive Reports* – Along with the current year's report, file retroactive reports for the years when the organization failed to file. The IRS may require additional documentation to support the request for reinstatement.
 - *Request Reinstatement* – Submit a request for reinstatement of tax-exempt status to the IRS. This often involves submitting a letter explaining the reasons for the lapse, the corrective actions taken and a plan for maintaining compliance.
 - *Pay Any Applicable Fees* – If reinstatement fees are associated, ensure they are paid promptly. The IRS may require payment of fees for each year the organization lost its tax-exempt status.
- **Update Stakeholders**
 - *Communicate with Stakeholders* – Inform members, donors and other stakeholders about the situation. Communicate the steps to rectify the lapse and the organization's commitment to compliance.

- **Implement Corrective Measures**

- *Strengthen Internal Controls* – Implement more robust internal controls and procedures to ensure ongoing compliance with IRS regulations. This may involve improving recordkeeping, governance practices and financial oversight.

- **Seek Professional Assistance**

- *Consult with Professionals* – Seek guidance from legal and tax professionals specializing in nonprofit compliance. They can advise on the specific circumstances of the lapse and help navigate the reinstatement process.

- **Prevent Future Lapses**

- *Establish Protocols* – Develop and implement protocols to prevent future lapses in compliance. This includes setting up reminders for filing annual reports, maintaining accurate records, and staying informed about regulatory changes.
- *Training and Education* – Provide board members and relevant staff with comprehensive training on nonprofit compliance and governance so that they understand their roles and responsibilities.

Reinstating 501(c)(3) status can be complex. It is crucial to act promptly and thoroughly to address the issues that led to the lapse. Professional guidance is highly recommended to navigate the reinstatement process effectively and prevent future compliance challenges.

Policies & Procedures

Policies and procedures are essential for Friends groups as they provide clear guidelines and expectations for how the organization will operate. Policies establish the rules that shape the organization's decision-making and behavior, ensuring consistency, transparency and alignment with the Friends' mission. For example, policies may address fundraising practices, volunteer behavior, or financial management.

On the other hand, procedures are the specific steps or processes that members need to follow to adhere to these policies. They offer instructions on implementing these policies in day-to-day activities like handling donations, arranging events, or conducting meetings.

While policies outline *what* needs to be done by the Friends, procedures detail *how* it should be done. Together, they help uphold orderliness, ensure responsibility, and bolster the group's effectiveness in supporting the library.

To operate efficiently and effectively as a Friends group, the following key policies are recommended:

FINANCIAL MANAGEMENT POLICY

- **Purpose** – To ensure responsible handling of the group's finances.
- **Key Elements** – Budgeting procedures, fundraising guidelines, expenditure controls, financial reporting, and audit requirements.



MEMBERSHIP POLICY

- Purpose – To define eligibility, rights and responsibilities of members.
- Key Elements – Membership criteria, joining and leaving procedures, membership dues, and member engagement strategies.

CONFLICT OF INTEREST POLICY

- Purpose – To prevent conflicts of interest in decision-making.
- Key Elements – Disclosure requirements, conflict management procedures, and board member and staff guidelines.

VOLUNTEER MANAGEMENT POLICY

- Purpose – To effectively manage volunteers and their contributions.
- Key Elements – Recruitment, training, roles and responsibilities, recognition and volunteer conduct.

MEETING POLICY

- Purpose – To ensure efficient and productive meetings.
- Essential Elements – Schedule, notice requirements, quorum rules, agenda setting, decision-making processes, and minutes documentation. (May already be covered in the bylaws)

FUNDRAISING AND DONATION POLICY

- Purpose – To guide fundraising efforts and the handling of donations.
- Key Elements – Fundraising methods, acceptance of donations, donor recognition, and restricted versus unrestricted funds management.

COMMUNICATIONS AND PUBLIC RELATIONS POLICY

- Purpose – To manage the Friends' internal and external communications and public image.
- Key Elements – Messaging guidelines, media relations, social media use, and promotional materials approval process.

RECORDS RETENTION AND DOCUMENTATION POLICY

- Purpose – To ensure proper maintenance and accessibility of essential documents.
- Key Elements – Retention periods for financial records, meeting minutes, contracts, member data, and guidelines for secure storage and document destruction.

ETHICS AND CONDUCT POLICY

- Purpose – To set expectations for ethical behavior and professional conduct.
- Key Elements – Standards for honesty, integrity, confidentiality and respect in all interactions.

COMMUNITY REPRESENTATION AND ACCESS POLICY

- Purpose – To ensure all community members feel respected, valued, represented and have fair access to opportunities within the organization.
- Key Elements – Strategies to ensure balanced representation and fair access in membership, leadership, and events, while fostering a welcoming and respectful environment.

PARTNERSHIP AND COLLABORATION POLICY

- Purpose – To manage relationships with the library, Foundation and other stakeholders.
- Key Elements – Roles and responsibilities, communication protocols, and joint project guidelines.

AMENDMENT AND REVIEW POLICY

- Purpose – To keep policies up to date and relevant.
- Key Elements – Procedures for reviewing and amending policies, including who can propose changes and how they are approved.

Having these policies in place and reviewing them regularly helps the Friends group operate with clarity, consistency and accountability, ensuring that all activities align with the Friends' mission and goals.

Records Management & Freedom of Information Act (FOIA) Compliance

Regardless of 501(c)(3) status, Friends groups must follow best practices for managing records to ensure transparency, accountability and legal compliance. This includes maintaining detailed documentation, such as meeting minutes, financial records (budgets and receipts), and membership information, all while safeguarding privacy and data. Legal documents like bylaws, articles of incorporation, and tax-exempt status papers should be kept up to date and securely stored. Additionally, a clear records retention policy is essential, outlining how long records should be retained and the process for proper disposal when they are no longer needed.

If the Friends group is a 501(c)(3) nonprofit organization, it is typically not subject to FOIA (Freedom of Information Act) laws. However, state laws — particularly in Virginia — may apply to certain records, especially when public funds are involved. For example, Virginia's FOIA laws may apply to shared library records, and Friends groups must understand which records are subject to these requirements. They should have clear procedures for handling FOIA requests, including redacting sensitive information, and work with library administration to manage shared records. More information on the Virginia Freedom of Information Act (FOIA) can be found in § 2.2-3700 of the Code of Virginia [<https://law.lis.virginia.gov/vacodepopularnames/virginia-freedom-of-information-act/>].

Educating board members about their FOIA responsibilities and best practices for recordkeeping is crucial. Regular training ensures compliance with legal requirements while promoting transparency in the organization's operations. By following these practices, Friends groups can maintain compliance, build trust, and more effectively support their library's mission.

Insurance

While insurance is not always required, it is important to investigate insurance options, as costs allow, to ensure the Friends organization is properly covered for unforeseen situations. Securing the correct type of insurance is critical for managing risks and maintaining the organization's stability. Here are the key types of insurance coverage to consider:

ESSENTIALS

- **General Liability Insurance** – Protects against claims arising from injuries, property damage or personal harm during Friends activities, meetings or events.
- **Property Insurance** – Safeguards the group's belongings, such as office equipment and event supplies, from theft, fire damage and other potential threats.
- **Directors and Officers (D&O) Insurance** – Offers security to board members and officers in the event of accusations of mismanagement that could lead to financial loss.

- **Volunteer Insurance** – Protects against injuries or accidents that volunteers may experience while participating in Friends activities.
- **Workers' Compensation Insurance** – If applicable, covers expenses such as lost wages for Friends employees who sustain injuries while performing their duties for the Friends organization, ensuring compliance with legal obligations.

EXPANDED

- **Event Liability Insurance** – Covers liabilities related to events organized by the Friends, such as book sales or fundraisers.
- **Business Crime Insurance** – Protects against losses from crimes like embezzlement, theft or fraud committed by employees or volunteers.
- **Professional Liability Insurance (Errors and Omissions)** – Protects against negligence claims or errors if the Friends group offers educational programs or consulting services.
- **Cyber Liability Insurance** – Deals with losses and liabilities resulting from data breaches, cyberattacks or unauthorized access to sensitive information.
- **Special Event Insurance** – Offers tailored coverage for events covering liabilities, property damage or cancellations to help manage risks associated with one-time or occasional activities.

It's important to talk to an insurance expert to understand the requirements of your Friends group and choose the right insurance. Keeping insurance policies up to date by reviewing them regularly helps ensure the group stays adequately protected as its activities and risks change over time.

Chapter 4: Running the Friends of the Library

Running the Friends of the Library group effectively is crucial for supporting and enhancing library services. Passion for libraries fuels this work, driving dedicated individuals to organize impactful events and initiatives. By focusing on solid organization and clear communication, the Friends can harness their enthusiasm to create meaningful community connections and secure vital library resources.

Board Meetings

For effective nonprofit board meetings, the most essential elements include:

- **Clear Agenda** – Prepare and distribute a detailed agenda to outline discussion topics, strategic questions, board development, and overall objectives before the meeting.
- **Minutes** – Accurately record meeting minutes to document decisions, actions and discussions.
- **Quorum** – Ensure that a quorum (the minimum number of board members required as articulated in the bylaws) is present to conduct official business.
- **Public Access** – If applicable, provide members and the public access to the meeting, including virtual participation options.
- **Decision-Making** – Facilitate precise and efficient decision-making processes, including voting on motions and resolutions.
- **Compliance** – Follow legal and organizational requirements, including conflict of interest policies and adherence to bylaws.
- **Financial Reports** – Review financial reports and updates to ensure the organization's fiscal health.
- **Action Items** – Assign and track action items to ensure follow-up on decisions and responsibilities.



Financial Transparency

It is essential for the Friends to maintain financial records by documenting all financial activities meticulously with the help of accounting resources and consistently updating these records as needed. Creating a budget that lays out anticipated revenue and projected expenditures is vital to this process; this budget should be assessed and endorsed by the board and possibly by the broader membership. Transparency is crucial when it comes to reporting; it's important to share regular financial reports at every meeting that provide a summary of income and expenses as well as the organization's overall financial situation.

To maintain honesty and accountability within Friends operations, it is essential to conduct routine internal audits or assessments regularly. Additionally, hiring an external auditor for an impartial evaluation is also advisable. Openness should be upheld in fundraising endeavors by outlining how funds are procured and distributed while segregating funds for distinct initiatives to maintain transparency. The organization should also prioritize membership dues transparency by ensuring members comprehend how their dues contribute toward supporting the library and Friends activities.

A record of financial rules and protocols for maintaining effective organizational management practices is crucial. These should cover regulations regarding financial resource handling, disclosure of financial data, and the approval process for expenses. When applying for grants, be transparent about the application procedure, including how the funds will be utilized and any reporting obligations that come with it. Lastly, holding dialogues during meetings about finances is critical in promoting transparency and encouraging active participation from all members to ensure everyone stays informed and engaged in the organization's financial well-being.

Community Representation & Accessibility

Ensuring community representation and access within the Friends Board and membership allows the board to represent various viewpoints and backgrounds reflecting their community and make better-informed decisions. By championing these principles within the Friends, the board can more effectively meet the needs of all its members, including those with disabilities. This approach helps to engage a broader audience and strengthens the organization's support network. Creating a welcoming environment in the Friends group involves offering accessible meeting spaces and implementing policies that promote fair participation and outreach to all community members. These efforts enhance a sense of belonging among members and improve the organization's effectiveness in advocating for and supporting the library's initiatives.

Here are some considerations and strategies for the Friends:

CONSIDERATIONS

- **Accessibility Audit** – Regularly review meeting spaces for accessibility to ensure they meet guidelines and are welcoming to all board members, including those with disabilities.
- **Digital Accessibility** – To create a welcoming online space that prioritizes digital accessibility, ensure all digital communications and online platforms are accessible to people with visual impairments and hearing difficulties.
- **Flexible Meeting Options** – Offer versatile meeting choices like video conferencing or teleconferencing to cater to the needs of board members or those who find it challenging to attend in-person meetings.

- **Communication Preferences** – Respect the communication preferences of board members and offer materials in various formats to accommodate different learning styles and accessibility needs.
- **Assistive Technologies** – Encourage the adoption of technologies that allow the Friends to utilize tools like screen readers and communication devices smoothly within the organization's digital infrastructure.
- **Accessible Transportation** – When planning meetings and events for the board and/or members, it's best practice to consider their transportation needs and ensure that the venue is accessible to all for full participation.

STRATEGIES

- **Recruitment** – Implement tactics to recruit members from a range of backgrounds and abilities, to build a board and membership that reflects the community's broad composition.
- **Training** – Provide training to board members to deepen their awareness and understanding of different cultures and improve their ability to make fair and respectful decisions.
- **Policies** – Adopt policies that actively support fairness and unbiased access to opportunity, fostering a culture where all individuals can thrive.
- **Language Accessibility** – To ensure that all members can fully engage, prioritize language accessibility by providing translations or interpreters for the board or members who speak languages other than the organization's primary language.
- **Cultural Competence** – Enhance board understanding by recognizing and celebrating a variety of cultural events and traditions, fostering a welcoming and respectful environment for all.
- **Accessible Information** – Ensure that information is easily available by offering it in formats that accommodate various audiences and needs, promoting clear and effective communication for everyone.
- **Open Dialogue** – Create an environment where board members feel encouraged to share their viewpoints and insights, fostering a space where different opinions are valued and respected.
- **Representation Matters** – Ensure that materials and websites reflect a broad range of individuals, showcasing the vibrant community the library serves.
- **Accessibility Advocacy** – Advocate for improvements in library facilities and services by collaborating with local disability organizations to continually enhance accessibility.
- **Regular Assessments** – Regularly evaluate the board and organization's practices to identify areas for improvement based on feedback, ensuring ongoing growth and responsiveness.

By incorporating these considerations and strategies into its approach, the Friends group can help foster a library setting that is welcoming for everyone in the community.

Strategic Planning

Close collaboration with the library's leadership team is crucial for the Friends' long-term plans to make a meaningful impact and align with the library's mission, vision and values. Creating a forward-looking plan ensures lasting influence and effectiveness in supporting the library. A well-structured approach provides a clear framework for guiding initiatives, fundraising campaigns and the organization's mission. This proactive mindset helps align the Friends' objectives with the library's evolving needs, ensuring relevant and sustained support.

The Friends group can support the library's strategic planning efforts, ensuring its initiatives complement its broader objectives. Collaboration with library leadership helps the Friends identify areas where their support can be most impactful, such as funding new programs, enhancing facilities, or expanding services. This alignment ensures their efforts complement the library's goals and strengthen the partnership between the two organizations.

Additionally, having a plan allows the Friends to prepare for future challenges and opportunities. It helps establish clear goals, manage resources effectively, and adapt to changing conditions. Regular evaluation and adjustment of the plan ensure that the Friends remain responsive to the library's evolving needs and the community's expectations. By aligning their planning with the library's long-term vision, the Friends can maximize their impact and create a lasting positive influence on the library and its patrons.

Consulting Legal Counsel

Legal counsel is essential for establishing and maintaining the Friends group's legal foundation and ensuring compliance with local, state and federal regulations. They help set up the organization as a 501(c)(3) nonprofit, review bylaws, and advise on board roles and governance practices.

To find and secure legal counsel, it's important to research law firms or individual attorneys specializing in nonprofit law. Recommendations from other nonprofits, local bar associations or professional networks can help identify suitable candidates. When selecting counsel, consider their experience, responsiveness, expertise in nonprofit governance, and fee structure, ensuring alignment with the organization's budget.

If applicable, legal experts can guide the Friends through the 501(c)(3) application process and advise on IRS requirements. They may assist with drafting and reviewing contracts for events, partnerships and vendor agreements to protect the Friends' interests, ensuring donations are managed properly through structured agreements and acknowledgment procedures. They also advise on liability protection and risk management strategies, including insurance coverage, and handle intellectual property matters such as trademark registration and copyright protection.

Counsel can support board conflict resolution through mediation, ensure compliance with fundraising and privacy laws, and provide legal guidance on real estate matters, such as leases or acquisitions. Additionally, they can offer ongoing legal education for board members, ensuring they stay informed about legal obligations and regulatory changes.

Finally, legal professionals can recommend improvements to governance and organizational policies, providing critical guidance during crises or controversies.

One Library System, Many Friends Groups

Effective coordination and communication are essential to ensure a cohesive partnership when a library system includes multiple branches, each with its own Friends group. While having a centralized Friends group that serves the entire system is often considered best practice, other models can also be effective. For example, each branch might maintain its own independent Friends group while collaborating on shared initiatives, or branches could form a hybrid structure with local Friends groups operating under the guidance of a larger umbrella organization. Here are some leading practices for managing numerous Friends groups:

- **Centralized Coordination** – A central library administration team or Friends steering committee should coordinate all Friends groups, acting as a liaison to ensure consistency and alignment with the library system's broader goals.
- **Regular Communication** – Create consistent communication channels, like newsletters or meetings, to inform Friends groups about systemwide initiatives, challenges and successes.
- **Unified Mission and Goals** – Ensure that each Friends group's mission aligns with the library system's overall goals to ensure consistent support across branches.
- **Collaborative Programming and Resource Sharing** – Encourage all the Friends groups to collaborate on joint programs and events, like systemwide book sales or author talks, to strengthen impact and build community.
- **Standardized Procedures and Financial Oversight** – Implement standardized procedures for financial reporting, membership and event planning across all Friends groups to ensure transparency, accountability and adherence to regulations.
- **Systemwide Impact Assessment and Volunteer Coordination** – Develop standard metrics for assessing the impact of Friends groups on the library system and centralize volunteer coordination to better utilize resources and avoid duplication of efforts.
- **Recognition, Training and Flexibility** – Recognize and appreciate the contributions of each Friends group and provide training and development opportunities to enhance their effectiveness. While collaboration is encouraged, allow each group the flexibility to address the unique needs of their local communities.
- **Community Input and Conflict Resolution** – Incorporate community feedback into planning to ensure responsiveness to local needs and establish a clear conflict resolution mechanism to address any disagreements.

By implementing these leading practices, a library system with multiple Friends groups can foster a collaborative and effective partnership, leveraging each group's strengths while maintaining a unified approach to supporting the library system as a whole.

Chapter 5: Membership & Volunteers

Members and volunteers play vital roles in a Friends group's success by offering valuable assistance through their time, skills and commitment. Their participation strengthens the organization's ability to achieve its objectives and nurtures a feeling of community ownership and pride in the library. Members and volunteers enrich the Friends' capacity to effectively promote and support the library's mission by bringing perspectives and talents to the table.



Members and volunteers play crucial roles in a Friends organization but serve in different capacities. Members usually offer backing through dues, participate in decision-making processes, and contribute to shaping the organization's vision. On the contrary, volunteers dedicate their time and expertise to the organization's tasks, like event planning or operations. While members may also volunteer, volunteers take an active, hands-on role in accomplishing the organization's objectives.

Membership

To ensure the success and longevity of the Friends, it is crucial to focus on recruiting and retaining members. Here are some key strategies to bring in members and maintain the interest of current ones:

RECRUITMENT

- **Highlight Benefits** – Outline the benefits of joining the Friends group, including access to exclusive events, early notifications about book sales, and the personal fulfillment of supporting literacy in the community and giving back.
- **Community Outreach** – Get involved in community outreach initiatives. Attend gatherings, festivals or community assemblies to raise awareness about the Friends and its goals.
- **Online Presence** – Create an online presence through a dedicated website and social media platforms. Use these channels to share updates about the Friends' activities, accomplishments and positive impact on the community.
- **Collaborate With Library Staff** – Foster collaboration with library staff to promote the Friends within the library premises. Organize recruitment events in library spaces. Ensure that library staff are well informed and supportive of membership drives.
- **Targeted Promotions** – Customize your marketing strategies for the community's demographics. Develop materials that resonate with various age groups and cater to varied interests.
- **Word of Mouth** – Encourage current members to advocate for Friends membership. Personal recommendations can be influential in attracting members.

- **Engage in Local Events** – Organize gatherings in partnership with other local groups. This is a way to connect with others, promote the Friends, and draw in new members.
- **Trial Memberships** – Consider introducing trial memberships or temporary discounts to entice individuals to explore the advantages of being part of the Friends before committing, if feasible.

RETENTION

- **Regular Updates** – Keep members in the loop with updates via newsletters, emails and social media posts. Share success stories, happenings and how their support has positively impacted the library.
- **Member Engagement** – Encourage members' participation in event planning and execution to nurture a sense of belonging and community spirit among the group.
- **Gather Feedback** – Regularly seek input from members through surveys to gather feedback on events, activities and overall satisfaction levels. This helps enhance offerings and demonstrates that members' opinions are valued.
- **Recognition and Appreciation** – Show appreciation for members' efforts by highlighting individual accomplishments, milestones or outstanding contributions during meetings and communications.
- **Members-Only Events** – Arrange special activities exclusively for members, such as private book sales, behind-the-scenes library tours, or expert guest lectures.
- **Flexible Participation Options** – Respect members' time constraints by offering participation choices like virtual meetings, asynchronous communication methods, or involvement in specific projects.
- **Renewal Incentives** – Offer perks to encourage members to renew their memberships, such as discounted event rates, complimentary access to exclusive programs, or early entry to book promotions.
- **Build Community Spirit** – Nurture a feeling of community among Friends members by arranging gatherings that promote networking opportunities and establishing an atmosphere that fosters connections between members and the library's goals.

Using these tactics, the Friends can draw in new members while maintaining the interest and dedication of current members who already support the library.

STRUCTURE

Creating the membership structure for the Friends involves thinking about the community makeup, the objectives of the Friends, and the financial backing required. Here are some items to consider when setting up your Friends membership structure:

- **Understand Community Needs** – Evaluate the income ranges and various elements that impact financial donations, guaranteeing that membership fees remain within reach for a wide range of community members.
- **Define Membership Categories** – Create membership tiers, including options for individuals, families and businesses, each offering unique benefits such as exclusive event access or special discounts.
- **Implement Tiered Dues** – Introduce a tiered dues structure that encourages higher contributions, with added benefits, while also accommodating those with limited financial resources, including an automatic renewal option.
- **Research and Benchmark** – Check out how other organizations structure their memberships to find successful models to emulate.

- **Incorporate Member Feedback** – Gather input from members through surveys or focus groups to fine-tune the dues structure and benefits.
- **Promote Fair Participation and Value** – Ensure categories are accessible to everyone and highlight the value of membership through targeted marketing efforts.
- **Collaborate With Library Staff** – Align membership categories with the library’s needs, incorporating feedback from library staff.
- **Offer Volunteer Alternatives** – Offer opportunities for individuals unable to make financial contributions to get involved as volunteers, providing a variety of ways to help support the library.
- **Review and Adjust Regularly** – Evaluate and adjust the membership structure based on community dynamics and feedback.

Creating a membership structure for the Friends is an evolving task that demands adaptability and attentiveness to the community requirements. Keep in touch with members regularly to evaluate the effectiveness of fundraising initiatives and adjust the framework as needed to guarantee the long-term viability of the Friends organization and its backing for the library.

Volunteers

Volunteers are vital to the Friends’ success, dedicating their time, talents and enthusiasm to assist in different projects. Maintaining an involved volunteer team requires implementing effective strategies for recruiting and retaining volunteers. Here are some methods for handling volunteer recruitment and retention:

RECRUITMENT

- **Focused Engagement** – Recognize groups in the community who may be interested in supporting the library, such as students, retirees, book enthusiasts or skilled professionals.
- **Community Collaborations** – Establish partnerships with schools, community groups and businesses. Join these organizations to promote volunteer opportunities and tap into their connections.
- **Online Presence** – Use platforms like the library’s website, social media channels and volunteer recruitment sites to publicize opportunities and engage a wider audience.
- **Informational Gatherings** – Host informational orientation events to acquaint potential volunteers with the Friends’ mission and goals and the impact of their contributions.
- **Team Up With Library Staff** – Collaborate closely with library personnel to pinpoint areas where volunteer assistance is required. Library staff can suggest volunteers based on their interactions with visitors.
- **Tailored Promotional Materials** – Create appealing and informative materials showcasing the advantages of volunteering for the Friends. Distribute these materials at library functions, local festivals and community gatherings.
- **Networking Events** – Organize gatherings or social events for volunteers to meet current volunteers, discover ongoing projects, and get answers to their questions.
- **Word of Mouth** – Urge existing volunteers to share their experiences with others. Personal endorsements from volunteers can impact recruitment.
- **Flexible Opportunities** – Provide a range of volunteer roles with varied time commitments. This enables individuals with schedules and skills to find a suitable position within the Friends.

RETENTION

- **Training and Onboarding** – Offer training and orientation to prepare new volunteers with the necessary skills and confidence.
- **Regular Updates** – Keep volunteers in the loop through newsletters, emails or social media updates.
- **Feedback and Follow-Ups** – Establish a feedback system and conduct regular follow-ups to address concerns and enhance the volunteer experience.
- **Appreciation and Recognition** – Regularly show gratitude to volunteers through spotlights, events or thank-you gestures.
- **Community Events** – Organize gatherings to foster community spirit and strengthen volunteer relationships.
- **Skill Enhancement** – Provide volunteers with opportunities to expand their skills through workshops or training sessions.
- **Clear Role Expectations** – Clearly outline roles, responsibilities, time commitments and specific duties in volunteer job descriptions to set appropriate expectations.
- **Flexible Schedules** – Accommodate schedules to retain volunteers with changing availability.
- **Volunteer Benefits** – Offer discounts, exclusive event access, or recognition in publications as volunteer incentives.
- **Inspiring Stories** – Share the success stories of volunteers to encourage continued participation.
- **Committees** – Establish volunteer committees to encourage teamwork and collective accountability.
- **Departure Discussions** – Conduct exit interviews to collect input to enhance volunteer engagement.

By implementing effective recruitment and retention strategies, the Friends can build a strong, committed volunteer base that significantly contributes to the success of their library.

MANAGING VOLUNTEERS

Overseeing volunteers is vital to the prosperity of every institution, particularly for the Friends. Skillful management guarantees that volunteers are appreciated, involved and prepared to contribute. By offering guidance, assistance and acknowledgment, groups can keep dedicated volunteers, boost their effectiveness, and cultivate a harmonious and cooperative atmosphere. Here are some leading practices to keep in mind when managing volunteers:



- **Volunteer Protection Act** – Enacted in 1997, this act safeguards volunteers working with nonprofit organizations like the Friends. This legislation protects volunteers from liability for negligence when carrying out their responsibilities as long as they meet specific conditions.
[<https://www.govinfo.gov/content/pkg/PLAW-105publ19/pdf/PLAW-105publ19.pdf>]
- **Workers' Compensation** – Workers' compensation regulations do not usually protect volunteers. Nevertheless, it's essential to establish an understanding of the volunteer arrangement to prevent misunderstandings or legal complications. Volunteers must know they do not have access to workers' compensation benefits.
- **Unemployment Compensation** – Volunteers do not qualify for unemployment benefits because they are not considered employees. Ensuring that volunteers understand their role and the terms of their involvement is crucial.
- **Anti-Discrimination Laws** – Anti-discrimination laws mainly pertain to employees. It is crucial to ensure that volunteers are treated fairly and unbiasedly. Avoiding discriminatory actions during volunteer recruitment, training and involvement is essential.
- **Child Labor Laws** – When volunteers include individuals who are minors, Friends groups should be aware of Virginia's child labor laws. Ensure that volunteers under 18 are engaged in appropriate tasks and comply with any restrictions on working hours.
- **Minimum Wage Laws** – Volunteers are not eligible for wage or overtime pay as they are not considered employees. It is crucial to recognize that the arrangement is voluntary and does not include any form of payment.
- **Background Checks** – Depending on the nature of the volunteer work, Friends groups may conduct background checks for certain positions, especially those involving direct interaction with library patrons, especially children. Virginia law regulates background checks for certain positions, such as those working with vulnerable populations. Check with local legal counsel for your requirements.
- **Insurance Coverage** – While optional, Friends groups should consider ensuring that their liability insurance covers volunteers. It is advisable to review insurance policies to confirm coverage for volunteers and their activities.
- **Confidentiality and Privacy** – Volunteers might be privy to sensitive information, and Friends groups should emphasize the importance of maintaining confidentiality and respecting patron privacy. This aligns with library ethics and policies.
- **Training and Orientation** – Ensure that volunteers receive training and orientation that covers details about the organization's rules, expectations and any relevant legal aspects. This will reduce misinterpretations and guarantee a pleasant volunteering experience.
- **Dispute Resolution** – Make sure there are ways to handle disagreements or issues while volunteering. Keeping communication open and being transparent can go a long way toward resolving problems peacefully.
- **Documentation** – Keep records of the volunteer work, such as the hours put in, tasks completed, and any signed agreements or waivers. Documentation is essential to showcase the volunteer partnership.
- **Compliance With Local Laws** – In addition to state laws, be aware of local ordinances or regulations that may impact volunteer engagement. Some localities may have specific requirements or recommendations for volunteer organizations.
- **Code of Conduct** – Establish a clear code of conduct for volunteers, outlining expectations regarding behavior, professionalism and adherence to library rules. This will help maintain a positive and respectful environment.

- **Review Policies Periodically** – Regularly review and update volunteer policies to ensure they align with current laws and leading practices. Stay informed about changes in Virginia employment laws that may impact volunteer engagement.

To ensure a legally sound environment for their volunteers, the Friends should stay current on relevant legal aspects and implement leading practices. In Virginia, seeking advice from experts or professionals to address any specific legal queries or issues regarding volunteer involvement is recommended.

Chapter 6: Advocacy

Friends organizations advocate for libraries across different levels of government. Effective advocacy is critical to securing library support, funding and acknowledgment. This includes raising awareness among the public, engaging with lawmakers, and establishing partnerships to showcase the library's value and secure resources.



Necessary advocacy involves tracking laws, participating in hearings, and organizing grassroots campaigns like writing letters. Working closely with library staff ensures a consistent message and the sharing of impactful stories.

Additionally, Friends should back initiatives such as enhancing technology access and promoting library programs while educating the community about funding measures. Staying informed about policy changes and offering advocacy training can boost effectiveness.

Drawing on resources from organizations like the American Library Association (ALA) and participating in events like National Library Legislative Day can further bolster advocacy endeavors. Through these activities, Friends groups contribute to maintaining libraries as community assets that receive strong support.

Actions for Supporting the Library

One way for Friends groups to support the library is by advocating through various methods:

- **Advocacy Committee** – Establish an advocacy committee within the Friends to coordinate efforts and engage with the community. Ensure active participation in relevant forums and meetings.
- **Community Engagement** – Organize events like author talks and workshops to highlight the library's impact. Host community forums to share stories about the library's benefits.
- **Sharing Information** – Use newsletters, social media and other platforms to share updates on the Friends' achievements and any joint initiatives with the library. Highlighting these successes helps emphasize the impact of their collaboration.
- **Partnerships** – Form alliances with organizations, schools and businesses to boost advocacy efforts. Get community leaders involved in advocating for the library.
- **Library Ambassadors** – Recruit and train advocates who can effectively communicate the value of libraries. Provide them with information and resources.
- **Legislative Awareness** – Stay informed about legislation affecting libraries and collaborate with other advocacy groups to advocate for their support. Arrange visits to lawmakers' offices to share information and discuss the library's needs.

By implementing these actions, library supporters can significantly boost advocacy efforts, guaranteeing that libraries remain backed by community resources.

Engagement With Elected Officials

All Friends groups can engage in advocacy to support libraries by building community support, raising awareness, and advocating for resources, regardless of their 501(c)(3) status.

Friends groups with 501(c)(3) status are allowed to engage with local, state and federal elected officials to advocate for library support as long as they follow IRS guidelines. While they can lobby for specific issues related to library needs, they must remain nonpartisan, avoid supporting political candidates, and ensure lobbying does not become a primary focus of their activities.

Cultivating strong relationships with elected officials who influence policy decisions and funding allocations is key. By coordinating these efforts with the library director and board, Friends can ensure alignment with the library's priorities. Implementing these tactics allows Friends to advocate effectively for the library with local, state and federal lawmakers, strengthening their advocacy's impact.

Here are some valuable ways Friends members can connect with elected officials:

- **Meetings**
 - Approach – Schedule meetings at various government levels.
 - Suggestions – Articulate the Friends' mission, share success stories, and stress the importance of ongoing funding.
- **Library Tours**
 - Approach – Invite elected officials to tour the library.
 - Suggestions – Highlight key programs and allow interaction with staff, patrons and volunteers.
- **Advocacy Letters and Emails**
 - Approach – Send personalized letters or emails advocating for library support.
 - Suggestions – Provide data on library impact and request ongoing support.
- **Phone Calls**
 - Approach – Organize a phone call campaign.
 - Suggestions – Use a script with key points and encourage callers to share personal stories, especially when new state legislation emerges.
- **Receptions and Recognition Events**
 - Approach – Plan receptions or social functions with elected officials.
 - Suggestions – Provide materials, build personal connections, and share success stories. Consider presenting awards to highlight their support.
- **Public Testimony**
 - Approach – Encourage members to share their stories at public meetings.
 - Suggestions – Focus on the library's community impact and projects supported by the Friends.
- **Forums or Town Halls**
 - Approach – Participate in forums or town hall meetings with elected officials.
 - Suggestions – Ask about library funding and advocate for its role in community growth.
- **Social Media Advocacy**
 - Approach – Use social media to engage elected officials and raise awareness.
 - Suggestions – Tag legislators in posts and share success stories or infographics.

Chapter 7: Friends Groups & Foundations

Libraries often utilize both Friends groups and Foundations to address various aspects of fundraising and support, each serving unique functions.

Friends of the Library groups are volunteer-driven and focus on community engagement through events such as book sales, author talks and seasonal fairs. They immediately support library programs like summer reading initiatives, patron activities and special events. Their work is essential for fostering local involvement and responding flexibly to the library's evolving day-to-day needs.



Library Foundations, on the other hand, handle large-scale fundraising and manage major gifts, endowments and planned giving. They are instrumental in funding significant projects such as building renovations, new technology, and large-scale collections, ensuring the library's long-term sustainability and strategic growth.

By combining the efforts of the Friends and the Foundation, libraries can effectively address both immediate community needs and long-term goals. Friends provide grassroots support and flexible funding for day-to-day operations, while the Foundation offers substantial financial backing for major initiatives. Coordinating between the two ensures a comprehensive approach, leveraging the strengths of each to enhance the library's overall mission.

Partnering With the Foundation

To build a successful partnership between a Friends of the Library group and a Library Foundation, focus on clear roles, effective communication, and shared goals:

- **Define Roles and Responsibilities** – Clearly outline each entity's distinct roles and responsibilities, including their focus areas and fundraising strategies.
- **Develop a Shared Vision** – Collaborate to create a unified vision aligned with the library's strategic goals, ensuring both entities work toward the same objectives.
- **Maintain Regular Communication** – Keep communication open and consistent with scheduled meetings, updates and joint planning sessions. Include the library and the library director in any plans and communications.
- **Coordinate Fundraising Efforts** – Align fundraising activities to avoid overlap and maximize impact. Determine which entity will handle specific types of fundraising, such as grants or events.
- **Designate Liaisons** – Assign a liaison from each group to streamline communication and coordination.

- **Collaborate on Events** – Plan and execute joint events and programs that benefit the library, such as author talks and fundraising galas.
- **Celebrate Successes** – Recognize and celebrate joint achievements to foster a positive partnership.
- **Ensure Financial Transparency** – Be open about how funds are raised, allocated and used to build trust and avoid misunderstandings.
- **Support Library Initiatives** – Actively back library projects and programs, from funding to resource enhancement.
- **Involve Library Staff** – Engage library staff in the partnership to ensure alignment with the library's mission and priorities.
- **Conduct Regular Evaluations** – Assess the partnership's effectiveness, make improvements, and adjust strategies as needed.
- **Establish Conflict Resolution** – Implement a clear resolution process to maintain a positive working relationship.
- **Engage the Community** – Include community feedback and ensure both entities are connected to library patrons.
- **Review MOUs Regularly** – If applicable, periodically update the Memorandum of Understanding (MOU) to reflect changes in roles or goals.

By following these practices, the Friends and the Foundation can effectively collaborate to enhance library support and achieve long-term success.

A Memorandum of Understanding (MOU) With the Foundation

When the Friends collaborate with the library and its Foundation, having a separate Memorandum of Understanding (MOU) between them can be beneficial. This additional MOU helps to clarify the roles and responsibilities of each fundraising group, preventing any overlap and ensuring their efforts complement each other instead of being repetitive.

It should follow a similar format to the basic MOU with the library but include a special section on coordinating efforts. This section outlines strategies to avoid duplication and ensure that the initiatives of both organizations have the most significant impact possible. By defining the activities of each group and promoting effective teamwork, this MOU improves the overall efficiency of the library's fundraising efforts.

Foundation Liaisons

Just as liaisons with Library Boards are essential, fostering strong partnerships between the Friends and the Foundation is crucial for aligning fundraising efforts and achieving shared goals. A leading practice is to appoint non-voting liaisons — such as a Friends Board member to the Foundation Board and a Foundation Board member to the Friends Board — to ensure open communication and strengthen collaboration. Additionally, a staff liaison, typically the director or their designee, should be included to facilitate coordination and offer additional support.

These liaisons are key in informing all groups about each other's priorities and initiatives, ensuring efforts are complementary rather than duplicative. Promoting transparency, sharing updates, and aligning objectives, these relationships help both organizations work more effectively together, ultimately maximizing their collective impact in supporting the library's mission.

Merging the Friends & the Foundation

Although not considered a best practice, merging the Friends and the Foundation can benefit the library by creating a more efficient fundraising and support system. This unified approach allows for better coordination in addressing the community's current and future needs. By combining the Friends' community involvement with the Foundation's major donations and planned gifts, the library can build a well-rounded support network. This method could strengthen the capacity to fund projects, from community programs to infrastructure developments.

A key advantage of this merger is its possible effectiveness in fundraising, merging community-driven and high-impact funding sources to address all needs efficiently. It may also improve resource allocation by providing a single contact for donors and a coordinated strategy for distributing funds while enhancing relationships with benefactors by showing how their contributions help achieve short- and long-term goals. However, this approach is not recommended unless there are clear, compelling reasons, as it can complicate governance and create challenges in maintaining distinct identities and missions.

A key disadvantage of this merger is that it can create several challenges. The distinct missions of the groups — one focused on community engagement and the other on larger, long-term fundraising — may become diluted. Governance and operational complexities could arise, leading to inefficiency, confusion and slower decision-making. Conflicting goals and priorities may make balancing community outreach with strategic financial planning challenging. The merger could also cause a loss of identity for each group, potentially alienating existing supporters. Legal, economic and staffing issues may complicate the process and require significant resources.

Merging the Friends and the Foundation into one entity may provide a holistic support system for the library, but it necessitates meticulous planning and coordination to align short-term needs with long-term objectives for the library's practical benefit. If a library's Friends and Foundation wish to attempt this, they should proceed with all due diligence and caution.

Chapter 8: Fundraising

The Friends group's main goal is to support and enhance the library's resources and programs. They work diligently to plan fundraising events and foster a strong community connection and appreciation for the library. Through various fundraising initiatives, the Friends ensure that the library can continue to provide essential services, upkeep its facilities, and promote literacy and educational opportunities for all. These organizations are vital in maintaining and expanding the library's impact within the community.

Overall Strategies

Friends groups employ various methods to raise funds and improve library services effectively. A key approach is organizing membership recruitment efforts, including drives to attract new supporters with appealing perks and tailored renewal campaigns to encourage current members to continue their support. These efforts can highlight the importance of their donations and showcase innovative projects to reinforce the impact of their involvement. (See Chapter 5: Membership & Volunteers).

The Friends often rely heavily on book sales to generate funds. Regularly hosting book sales, whether ongoing or periodically, and publicizing them through media platforms like newsletters and community bulletin boards can be a fruitful way to raise money. In addition to book sales events, specialty book sales, such as themed or rare book auctions, should be considered to attract niche audiences and maximize revenue potential.

Engagements and activities provide opportunities to raise funds in various ways. For example, teaming up with nearby writers for book presentations and autograph sessions can generate revenue from ticket purchases. Similarly, seminars and educational events alongside cultural happenings like art displays or shows can bring in funds from entry fees, ticket sales and support from sponsors and donors.

Modern online fundraising techniques also play a crucial role. For projects, start crowdfunding initiatives on websites such as Kickstarter or Indiegogo and organize virtual gatherings or internet auctions to broaden exposure and make it easier to receive donations online.

Formulating partnerships and obtaining sponsorships from companies and major corporations are also helpful tactics to consider. Local businesses might be interested in offering sponsorships in return for exposure at gatherings. In contrast, corporations could contribute funds through sponsorships or programs that match donations that support their social responsibility objectives.



Merchandise sales can be a way to raise funds by selling branded products like tote bags or T-shirts with the Friends' or library's logo on them. Teaming up with the library to offer themed merchandise for added income benefits both the library and the Friends group.

While the possibilities for fundraising efforts are practically endless, you can find a list of ideas toward the end of this handbook in Appendix J.

Donations

Individual donations are a cornerstone of the Friends' fundraising efforts, providing vital support for library programs and services. Reaching out to potential donors through personalized mail or email requests helps build connections and encourages generosity. It's also important to make donating as easy as possible, so having a secure, user-friendly donation platform on both the Friends and library websites is essential. Clear policies and procedures should be in place to ensure that every donation is handled with care, promoting transparency and proper management.

Major gifts and planned giving, including bequests, endowments and trusts, are vital to fundraising efforts. Building relationships with major donors helps secure larger contributions, while planned giving allows for lasting legacies. Clear policies are essential to managing these gifts, honoring donor wishes, and meeting legal requirements. Donations made in memory or honor of someone also offer a meaningful way to give back, with clear procedures for proper recognition and documentation.

Matching gift programs can significantly increase the impact of donations. It is essential to encourage donors to take advantage of their employer's matching gift programs and set up clear guidelines for verifying and managing these contributions. Similarly, when running community challenge campaigns where donations are matched by local businesses or individuals, having clear instructions for execution and monitoring ensures success.

Where applicable, it is important to coordinate donation efforts with the library's Foundation to maximize the overall impact of philanthropic support. Collaborating on donor engagement, especially for larger gifts or long-term funding strategies, strengthens both organizations' fundraising activities. Establishing consistent communication between the Friends and the Foundation helps ensure that donations are appropriately recognized and managed according to the needs of both the library and the donors.

Establishing rules and guidelines for managing all donations is vital to maintaining transparency and efficiency. Unlike fundraising through events or sales, donations are deeply personal and require careful handling to maximize their impact and build trust within the community.

Grants

Grants provide a valuable opportunity for the Friends to secure financial support for library projects and initiatives. To increase the chances of success, begin by researching grants that align with both the Friends' objectives and the library's strategic goals. This may include opportunities from foundations, government bodies and private entities. Utilizing grant databases and online tools can streamline the search process. Additionally, offering training and professional development in grant writing can further enhance the team's ability to secure funding.

Once potential grants have been identified, set up a schedule to track application deadlines and prioritize those that best match the library's needs. Each submission should be tailored to meet the specific criteria

of the grant, including a clear project outline, a detailed budget, and any necessary supporting documents. Collaborating with library staff is crucial to ensure these submissions align with the library's goals.

Ensure that grant applications are submitted on time and follow up with the grant providers to ask about decision timelines or any additional requirements. Regardless of the outcome, remember to express gratitude, which helps build positive relationships with the funding providers.

If a grant application is successful, it's important to adhere to all conditions and manage the funds responsibly. Set up a system to monitor expenses, track progress, and update the grant provider on key project milestones.

The Friends may pursue grants independently for projects that align with their goals, but it's important to communicate with the library regarding grant efforts when applicable. This ensures a strategic approach, fosters collaboration, and prevents duplication of efforts. If collaboration is beneficial, working together can enhance the ability to secure funding for significant projects in alignment with the library's needs.

Broaden your funding sources by seeking grants from both governmental organizations and private foundations. Create a system to track and evaluate the progress of funded projects and use the collected data to demonstrate their success.

Continually seek additional funding sources for long-term sustainability and form partnerships as needed. Regularly update current strategies to adapt to changing needs and opportunities, ensuring that the Friends can consistently secure the resources necessary to enhance library services and promote community involvement.

Signature Events

Planning a standout event goes beyond just getting the basics right. It's about creating moments that resonate deeply and echo the essence of the organization. Imagine crafting an event that's not just another date on the calendar but a signature milestone, marked with unique themes or groundbreaking ideas that captivate and distinguish it from the usual fare.

For organizations like Friends groups, where the heart lies in libraries and literature, envision weaving these passions into the fabric of the signature event. Think literary themes, collaboration with authors, and activities that draw the crowd into a narrative, leaving them with lasting memories and a deep connection to your cause. Close coordination with the library ensures the event aligns with its mission and goals, avoids duplicating efforts, and reinforces a unified message while strengthening the partnership.

Getting the word out and capturing attention is key. It's not just about announcing an event; it's about crafting stories and engaging content that reaches and resonates with a broad audience, making it the talk of the town. Equally, building bridges with local businesses, artists and influencers can turn the event into a community centerpiece, drawing strength and support from the collective.

Behind the scenes, fundraising is the engine that drives any event toward its goals. This could mean ticket sales, auctions or securing sponsorships and donations. Every detail matters — from the choice of venue to the selection of auction items — all intricately planned and seamlessly executed to offer an unparalleled experience.

Ultimately, a successful event does more than just entertain; it inspires change, fosters community spirit, and supports a cause. It's about adaptability, scalability and creating something genuinely impactful that strengthens connections and nurtures support within the community.

Capital Campaigns

Capital campaigns are essential for libraries to raise substantial funds for major projects like renovations, expansions or new facilities. These campaigns focus on securing significant donations over a defined period and often involve deep community engagement and strategic planning.

While many libraries have Foundations dedicated to leading such campaigns, the Friends group plays a critical role in supporting and enhancing these efforts. They mobilize networks, organize events, and bring a personal touch to fundraising activities, contributing grassroots energy that can complement the more formal strategies of a Foundation.

When a library does not have a Foundation, the responsibility for managing the capital campaign falls directly to the Friends. In these instances, the Friends group takes the lead in all aspects of the campaign, from donor outreach to event planning, working closely with library staff to ensure alignment with the library's goals and needs.

For the best outcomes, Friends groups should begin by setting clear goals and timelines and crafting a compelling case for support that resonates with the community. Identifying major donors who can contribute significantly is crucial, and ongoing communication about the campaign's progress will help maintain momentum and build trust.

If a Foundation exists, collaboration allows the Friends to focus on community engagement while the Foundation handles the more complex financial and legal aspects. However, when the Friends run the campaign independently, they must ensure they have the expertise and resources to manage the process, including seeking external advisors or member training.

Whether partnering with a Foundation or leading the campaign independently, the Friends' involvement is key to securing the resources needed to advance the library's mission and ensure its long-term success.

Chapter 9: Handling Special Challenges

This brief chapter addresses some common situations encountered by Friends groups that do not align with the abovementioned chapters.

Small Community

In small communities, finding enough individuals to fill various leadership roles can be challenging, often leading to people taking on multiple responsibilities. However, it's essential to maintain a clear separation between the roles of Friends Board members, Library Board members and library staff.



Separating these roles is crucial for multiple reasons. First, it ensures fair decision-making by preventing any one person from exerting undue influence across multiple library-related positions. Second, it helps avoid conflicts of interest arising from overlapping responsibilities. Finally, it protects the reputation of both the Friends and the library by preventing any perception of impropriety.

Even though close connections within small communities may lead to some role overlap, adhering to clear role distinctions is best practice. Striving for this separation, whenever possible, enhances transparency, accountability and the integrity of both organizations and their operations.

Out of Alignment with Library Priorities

While the Friends group operates as an independent 501(c)(3) organization, its core mission is to support the library, and its objectives must align with the library's mission, values and strategic plan. In Virginia, public libraries are required to develop a new strategic plan every five years, which involves community needs assessments, user surveys and evaluations of resources and future needs. Friends Board members often play a key role in this process as community partners.

Collaboration between the Friends and the library ensures that their efforts are in sync with the library's strategic priorities. This alignment helps identify areas not covered by the library's operational budget, where the Friends can provide valuable support. For example, while some might focus solely on youth services, the library's strategic plan may highlight unmet needs, such as programs for older adults or technology upgrades, where the Friends can step in.

As the library's priorities evolve, the Friends group can adjust its focus to better support these changes. This flexibility allows the Friends to realign their fundraising and programming efforts to meet the library's shifting needs and goals. A strong relationship between the Friends group and the library is crucial for ensuring both organizations work harmoniously to address the community's dynamic needs and strengthen the library's mission.

Off Mission

If a Friends group realizes it has strayed from its mission, it's crucial to address the issue promptly. Leadership should initiate an open conversation to understand what went wrong, why it happened and how to regain focus. Taking responsibility and acknowledging any missteps is key to rebuilding trust. Reviewing recent activities, documents, financial records and communications will help identify areas of misalignment, while gathering input from stakeholders can provide valuable insight into the impact of these actions.

After this discussion, the Friends should create a clear action plan with specific tasks and timelines to realign its efforts. Regular progress monitoring and open communication are vital to ensuring ongoing alignment with the mission. Consulting an expert is essential to ensure compliance and maintain a positive atmosphere if legal concerns emerge. By following these steps, the organization can strengthen its contributions and reinforce its commitment to the mission.

On the Brink of Dissolution

If your Friends group is struggling or on the brink of dissolution, you can choose between revitalizing the group or starting fresh.

Revitalizing the Group – First, assess why the group is struggling. Look into aspects like declining participation, unclear goals, or burnout among current board members. Host a brainstorming session with remaining members and key library stakeholders to identify ways to re-energize the group. This might involve redefining the group's mission, recruiting new members, or offering training to build skills and motivation. Consider relaunching with fresh initiatives or events to reignite interest and involvement. It's about tapping into the group's original passion and finding new ways to connect with the community.

Restarting the Group – If revitalization efforts aren't feasible, it might be time to dissolve the existing group and start anew. Begin by formally ending the current group's operations in line with legal requirements and by informing all stakeholders. Afterward, use the lessons learned to build a new Friends group with a clear vision and robust structure. This might involve starting with a clean slate, recruiting individuals strongly committed to the library's mission, and establishing a solid plan to ensure long-term success. This fresh start can offer a chance to build a more engaged and effective group from the ground up.

Choosing between revitalizing or restarting depends on your Friends group's specific challenges and available resources. Whether you breathe new life into the old group or build a new one, the goal remains the same: strengthening support for your library and its community. Take that first step confidently, knowing your efforts will make a lasting impact.

Appendices

This list follows the order in which the items appear in the handbook content.

- A. Job Description – Friends Board Member
- B. Conflict of Interest Policy
- C. Conflict of Interest Disclosure
- D. Ethics Statement
- E. Onboarding Checklist
- F. Exit Checklist
- G. Memorandum of Understanding (MOU)
- H. Articles of Incorporation
- I. Bylaws
- J. Fundraising Ideas

A: Job Description – Friends Board Member

Job Title: Friends of the Library Board Member

Terms of Appointment: [Insert term limit information]

Position Overview: The Friends of the Library Board member is a volunteer role dedicated to supporting and enhancing the mission of the local library through advocacy, fundraising and community engagement. Board members collaborate with library staff, fellow board members and the community to promote its services and ensure its continued success.

Key Responsibilities:

- **Advocacy and Outreach** – Act as an ambassador for the library, promoting its services, programs and events to the community. Engage in outreach efforts to increase public awareness and support for the library.
- **Fundraising** – Participate in planning and executing fundraising activities such as book sales, events and grant writing. Assist in securing donations and sponsorships from individuals, businesses and organizations.
- **Governance and Leadership** – Attend regular board meetings and contribute to developing and implementing the Friends group's strategic goals. Provide input on policies, programs and initiatives that align with the library's mission.
- **Financial Oversight** – Work with the treasurer to review and manage the organization's finances, ensuring transparency and accountability. Participate in budget discussions and approve financial expenditures.
- **Event Planning** – Help organize and volunteer at events hosted by the Friends group, including fundraising events, membership drives, and community outreach activities.
- **Membership Development** – Help recruit and retain members for the Friends group. Develop membership strategies and encourage community involvement.
- **Library Collaboration** – Maintain a strong working relationship with library staff and administration. Ensure the Friends' activities align with the library's needs and priorities.
- **Long-Term Planning** – Participate in discussions about the Friends group's long-term sustainability. Contribute to succession planning, volunteer recruitment, and leadership development.

Qualifications:

- Passion for libraries and a commitment to supporting their mission.
- Strong communication and interpersonal skills.
- Ability to work collaboratively with others.
- Experience in fundraising, event planning, or nonprofit governance is a plus, though optional.
- Willingness to dedicate time and energy to board meetings, events and initiatives.
- Understanding or willingness to learn about the library's services, programs and needs.

Time Commitment:

- Attend monthly board meetings (typically 1-2 hours).
- Participate in fundraising events and community outreach activities.

- Contribute to committee work or special projects as needed.

Benefits:

- Opportunity to make a meaningful impact on the community by supporting the library.
- Experience in nonprofit governance, fundraising and community engagement.
- Networking with like-minded individuals who share a passion for libraries and literacy.

How to Apply: Interested candidates should submit a letter of interest and a brief resume outlining their relevant experience and why they want to serve as a Friends of the Library Board member.

This job description provides an overview of the key responsibilities and qualifications needed for a Friends of the Library Board member. The role is vital to supporting the library's mission and ensuring its continued success within the community.

B: Conflict of Interest Policy

Purpose: The purpose of this Conflict of Interest Policy is to protect the interests of the Friends organization when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a board member or result in a possible excess benefit transaction. This policy is intended to supplement, but not replace, any applicable state and federal laws governing conflict of interest relevant to nonprofit and charitable organizations.

I: DEFINITIONS

1. **Interested Person:** Any board member, officer or committee member with governing board-delegated powers with a direct or indirect financial interest, as defined below, is an interested person.
2. **Financial Interest:** A person has a financial interest if the person has, directly or indirectly, through business, investment or family:
 - a. An ownership or investment interest in any entity with which the Friends have a transaction or arrangement;
 - b. A compensation arrangement with the Friends or with any entity or individual with which the Friends has a transaction or arrangement; or
 - c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Friends is negotiating a transaction or arrangement.
3. **Compensation:** This includes direct and indirect remuneration and gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. A person with a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

II: DUTY TO DISCLOSE

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be allowed to disclose all material facts to the board members and members of committees with board-delegated powers considering the proposed transaction or arrangement.

III: DETERMINING WHETHER A CONFLICT OF INTEREST EXISTS

After disclosing the financial interest and all material facts and after discussing it with the interested person, the person shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

IV: PROCEDURES FOR ADDRESSING THE CONFLICT OF INTEREST

1. An interested person may make a presentation at the board or committee meeting. However, after the presentation, they must leave the meeting during the discussion and vote on the transaction or arrangement involving the possible conflict of interest.
2. If appropriate, the president of the board or committee shall appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
3. After exercising due diligence, the board or committee shall determine whether the Friends can, with reasonable efforts, obtain a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

4. In the case where a more advantageous transaction or arrangement is not reasonably possible under the circumstances not producing a conflict of interest, the board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Friends' best interest, for its benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall decide whether to enter into the transaction or arrangement.

V: Violations of the Conflicts of Interest Policy

1. In the case where the board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and allow the member to explain the alleged failure to disclose.
2. If, after hearing the member's response and making further investigation as warranted by the circumstances, the board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

VI: Records of Proceedings

The minutes of the board and all committees with board-delegated powers shall contain the following:

1. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the board's or committee's decision as to whether a conflict of interest existed.
2. The names of the persons present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

VII: Compensation

1. A board-voting member who receives compensation, directly or indirectly, from the Friends for services is precluded from voting on matters pertaining to that member's compensation.
2. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Friends of the Library for services is precluded from voting on matters pertaining to that member's compensation.
3. No voting member of the board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Friends, individually or collectively, is prohibited from providing information to any committee regarding compensation.

VIII: Annual Statements

Each board member, officer and member of a committee with board-delegated powers shall annually sign a statement that affirms such person:

- Has received a copy of the Conflicts of Interest Policy,
- Has read and understands the policy,
- Has agreed to comply with the policy, and
- Understands that the Friends group is a charitable organization. To maintain its federal tax exemption, it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

IX: Periodic Reviews

To ensure the Friends group operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. These reviews shall, at a minimum, include the following subjects:

- Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's-length bargaining.
- Whether partnerships, joint ventures and arrangements with management organizations conform to the Friends of the Library's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes, and do not result in inurement, impermissible private benefit, or in an excess benefit transaction.

X: Use of Outside Experts

When conducting the periodic reviews, the Friends may either opt to use outside advisors or conduct the reviews themselves. If outside experts are used, their use shall not relieve the board of its responsibility for ensuring periodic reviews are conducted.

This Conflict of Interest Policy is designed to ensure that the Friends Board members act in the organization's best interests, maintain transparency, and avoid conflicts that could jeopardize the organization's integrity or tax-exempt status.

C: Conflict of Interest Disclosure Statement

Name: _____

Position: _____

Date: _____

I, [Name], hereby acknowledge and disclose any potential conflicts of interest that may arise in my role as [Position] within [Friends of the Library Group Name]. I understand that it is my responsibility to promptly disclose any situations where my interests or relationships could influence, or be perceived to influence, my objectivity, decisions or actions related to the organization.

Please check the applicable boxes and provide details where necessary:

☐ I have no conflicts of interest to disclose.

☐ I have a financial interest or relationship that may pose a conflict of interest. Details:

☐ I have a family relationship that may pose a conflict of interest. Details:

☐ I have a personal relationship that may pose a conflict of interest. Details:

I understand that failure to disclose conflicts of interest may undermine the integrity of [Friends of the Library Group Name] and could result in disciplinary action.

Signature: _____ Date: _____

D: Ethics Statement

Introduction:

The Friends of the Library for [Library Name] is dedicated to upholding ethical standards in its activities, interactions and decision-making processes. This Ethics Statement sets out the principles and values that steer the behavior of Friends members, volunteers and leaders as they work to assist the library and the community.

Core Values:

As members of Friends of the [Library Name], we are guided by the following core values:

1. Integrity – We adhere to the principles of honesty, openness and responsibility. Our actions are guided by ethics as we honor the trust bestowed upon us by the library, community and fellow Friends members.
2. Respect – We treat all individuals with dignity and respect, acknowledging and embracing the variety of viewpoints, backgrounds and life stories within our organization and the community.
3. Stewardship – We are responsible stewards of the resources entrusted to us, whether financial assets, intellectual property, or the community's support. Our goal is to utilize these resources effectively to carry out our mission.
4. Belonging – We strive to create an atmosphere where all individuals are welcomed, valued and respected, regardless of their background or personal characteristics.
5. Community Focus – Our actions and decisions are guided by the best interests of the community and the library. We work collaboratively to enhance the well-being and cultural richness of the community we serve.

Ethical Principles:

1. Conflict of Interest – Members of the Friends shall disclose any personal, financial or professional interests that may conflict or be perceived to conflict with the organization's best interests. Conflicts shall be managed transparently and with the organization's best interests in mind.
2. Confidentiality – Friends members respect the confidentiality of sensitive information acquired during their involvement with the organization. Personal and organizational information shall be handled with discretion and care.
3. Fairness and Respect – The Friends group is committed to all individuals' fair and respectful treatment. Decisions regarding membership, volunteer opportunities, and access to benefits shall be made without discrimination.
4. Compliance With Laws and Regulations – Friends members shall comply with all applicable laws and regulations governing nonprofit organizations. Any legal or ethical concerns shall be promptly addressed and reported to the appropriate authorities.
5. Financial Responsibility – Friends members involved in financial matters shall exercise due diligence, transparency and accuracy in managing funds. Financial records shall be maintained with integrity and made available for audit.

Accountability:

Friends members are accountable to each other, the library and the community for upholding these ethical principles. Violations of this Ethics Statement may result in corrective action, up to and including termination of membership and/or removal from leadership positions.

Review and Amendments:

This Ethics Statement shall be periodically reviewed by the Friends leadership to ensure its relevance and effectiveness. Amendments may be made with the membership's consensus, and updates shall be communicated transparently.

Acknowledgment:

I, [Name], as a Friends of the Library Board member, acknowledge that I have read and understand the Ethics Statement. I commit to upholding these core values and principles and fostering an ethical and welcoming environment within our organization.

Print Name

Signature

Date

E: Onboarding Checklist

Pre-Orientation:

- ☐ Welcome Email – Send a warm welcome email introducing the new board member to the rest of the board and providing initial information about the organization.

Orientation Meeting:

- ☐ Introduction to Board Members
 - ☐ Meet and greet with current board members.
 - ☐ Brief introduction of each board member, their role and expertise.
- ☐ Overview of Friends of the Library
 - ☐ Brief history and mission of the organization.
 - ☐ Key achievements and projects.
- ☐ Roles and Responsibilities
 - ☐ Provide a detailed overview of the roles and responsibilities of board members.
 - ☐ Discuss the fiduciary duties and legal obligations.
- ☐ Organizational Structure
 - ☐ Explanation of the organizational structure, including committees and their functions.
- ☐ Bylaws Review
 - ☐ Distribution and review of the organization's bylaws.
- ☐ Strategic Goals and Objectives
 - ☐ Discussion of the organization's current strategic goals and future plans.
- ☐ Upcoming Events and Projects
 - ☐ Overview of the forthcoming events, fundraisers and projects.
- ☐ Financial Overview
 - ☐ Review of the organization's financial statements.
 - ☐ Explanation of budgeting and financial planning.
- ☐ Communication Channels
 - ☐ Introduction to communication tools and platforms used by the board.
 - ☐ Overview of regular meeting schedules.
- ☐ Library Partnership
 - ☐ Introduction to Library Staff – Meet with key library staff.
 - ☐ Discuss the collaborative relationship between Friends of the Library and the library.
- ☐ Documentation and Resources
 - ☐ Access to Shared Documents – Provide access to shared folders or platforms containing essential documents.
 - ☐ Ensure the new member has login credentials.

- ☐ Resource Package
 - ☐ Provide a resource package containing relevant materials, including reports, brochures and templates.

Follow-Up:

- ☐ Q&A Session
 - ☐ Provide an opportunity for the new board member to ask questions.
- ☐ Mentor Assignment
 - ☐ Assign a seasoned board member as a mentor to provide ongoing support.
- ☐ Follow-Up Meeting
 - ☐ Schedule a follow-up meeting to address any additional questions and concerns.
- ☐ Ongoing Involvement
 - ☐ Committee Assignments – Assign the new board member to specific committees based on their interests and expertise.
 - ☐ Training Opportunities – Highlight upcoming training sessions, webinars or workshops relevant to board responsibilities.
 - ☐ Regular Check-Ins – Schedule regular check-ins during the first few months to ensure the new member settles in well.

Using this checklist, the Friends can ensure new board members receive a comprehensive orientation, setting them up for success. Adjustments can be made based on each organization's specific needs and structure.

F: Exit Checklist

Notification and Transition:

- ☐ Provide Advance Notice – Notify the board of the decision to step down with sufficient advance notice.
- ☐ Transition Plan – Collaborate with the board to create a transition plan for handing over responsibilities.

Board Responsibilities:

- ☐ Handover of Responsibilities – Clearly communicate the handover of specific responsibilities and tasks.
- ☐ Official Resignation (if applicable) – Submit an official resignation letter to the board.
- ☐ Acknowledgment – Receive acknowledgment from the board for contributions during the term.
- ☐ Recognition – Ensure appropriate recognition is provided in newsletters, announcements or other communication channels.
- ☐ Handover Event (optional) – If appropriate, participate in or organize a handover ceremony or event.

Documentation and Handover:

- ☐ Board Materials – Compile and organize all relevant board materials, including meeting minutes, reports and documentation.
- ☐ Access and Passwords – Provide login credentials and access information for any platforms or shared documents.
- ☐ Key Contacts – Share a list of key contacts, including fellow board members, library staff, and external partners.
- ☐ Ongoing Projects – Document the status of ongoing projects and provide relevant background information.

Return of Materials:

- ☐ Return Board Materials – Return any physical or borrowed materials, such as documents, books or equipment.
- ☐ Return Technology – Return any technology devices or equipment provided by the organization.

Knowledge Transfer:

- ☐ Meetings with Successor – Schedule meetings with the incoming board member or successor to discuss key responsibilities and insights.
- ☐ Training Sessions – Offer training sessions or shadowing opportunities to ensure a smooth transition.

Final Board Meeting:

- ☐ Attend Final Board Meeting – Make arrangements to attend a final board meeting to officially announce the departure.
- ☐ Farewell Message – Prepare and share a farewell message expressing gratitude and well wishes.

Exit Interview or Survey:

- ☐ Exit Interview or Survey – Participate in an exit interview or complete an exit survey to provide feedback on the board experience.

Follow-Up:

- ☐ Stay Connected (optional) – Express a willingness to stay connected and provide occasional support or guidance.
- ☐ Provide Contact Information (optional) – Share personal contact information for potential follow-up questions.

This checklist aims to facilitate a well-organized and respectful transition for a departing Friends Board member. Organizations may tailor the checklist based on their specific needs and practices.

G: Memorandum of Understanding (MOU)

I. Introduction

This Memorandum of Understanding (MOU) is made and entered into by and between the Friends of the [Name] Library (hereinafter referred to as “the Friends”) and the [Name] Library (hereinafter referred to as “the Library”). This MOU outlines the mutual understanding, roles, responsibilities and the collaborative relationship between the Friends and the Library.

II. Purpose

The purpose of this MOU is to establish a clear framework for collaboration between the Friends and the Library to ensure the effective and efficient support of the Library’s mission, programs and services. This agreement recognizes the Friends as a separate legal entity with the shared goal of advocating for and supporting the Library.

III. Mission Statements

1. **Library Mission:** The Library’s mission is [to provide access to information, resources and programs that enhance the community’s educational, cultural and recreational needs.]
2. **Friends Mission:** The Friends’ mission is [to raise funds and increase public awareness in support of the Library’s services and programs]. The Friends operate independently of the Library but with a common goal of fostering the Library’s growth and sustainability.

IV. Roles and Responsibilities

A. The Library Agrees to:

1. *Strategic Collaboration:*
 - To align the Friends’ efforts with the Library’s strategic goals and initiatives, the Friends should be included in the Library’s long-range planning process.
 - At the beginning of each fiscal year, provide the Friends with a detailed list of strategic initiatives and anticipated needs.
2. *Operational Support:*
 - Provide staff support to assist the Friends with marketing, communication and event planning.
 - Offer space within the Library for Friends’ materials, such as membership brochures and promotional items.
 - Allocate space for Friends’ activities, including book sorting, storage and sales, if possible.
3. *Communication:*
 - Maintain regular communication with the Friends through the Library director and/or the designated staff liaison, ensuring transparency and mutual understanding of ongoing projects and needs.
 - Ensure that the Library director or a designated representative attends Friends’ meetings in an advisory capacity.

4. *Gift Acceptance:*

- Retain final authority on accepting or declining any gifts made to the Library.

B. The Friends Agree to:

1. *Support and Advocacy:*

- *Publicly support the Library's policies, programs and services.*
- *Advocate for the Library within the community, promoting its value and securing public and financial support.*

2. *Financial Contributions:*

- Unless otherwise agreed upon by both parties, use funds raised by the Friends exclusively to support the Library's needs as outlined in the annual strategic initiatives.
- Discuss and vote on the Library's funding requests and ensure timely financial support for agreed-upon expenditures.

3. *Organizational Integrity:*

- Adhere to all IRS guidelines and legal obligations for 501(c)(3) organizations to maintain nonprofit status.
- Develop and implement a succession plan to ensure the continuity of the Friends' organization and activities.

4. *Communication and Reporting:*

- Provide regular financial reports and updates to the Library on fundraising activities and expenditures.
- Maintain open communication with the Library administration, including regular participation in planning meetings.

5. *Collaboration and Boundaries:*

- Ensure the Friends does not duplicate the Library's efforts, respecting the roles assigned to Library staff
- Promote clear understanding and effective collaboration between the Friends and the Library.

V. Governance and Decision-Making

1. *Ex-Officio Positions:*

- The Library director or a designated staff member shall serve as an ex-officio member of the Friends Board in a non-voting advisory role.
- A representative of the Library's Board of Trustees shall also serve as a liaison to the Friends Board to ensure alignment of goals.

2. *Decision-Making:*

- Major decisions affecting the Library's use of funds provided by the Friends shall be made collaboratively, with input from both the Friends and the Library administration.
- Any amendments to this MOU shall require mutual agreement and be signed by both parties.

VI. Term and Review

1. Duration:

- This MOU shall remain in effect for [three] years from the date of signing unless terminated or modified by mutual agreement.

2. Annual Review:

- Both parties shall review the MOU annually to ensure continued alignment of goals and responsibilities.

VII. Termination

Either party may terminate this MOU with 90 days' written notice. Upon termination, any remaining funds raised by the Friends for the Library shall be handled in accordance with the Library's gift acceptance policies.

VIII. Signatures

This MOU is agreed upon and signed by the representatives of the Friends of the [Name] Library and the [Name] Library.

Signatures:

Friends of the [Name] Library

Name

Title: President

Date: _____

[Name] Library

Name

Title: President, Board of Trustees

Date: _____

H: Articles of Incorporation

Below is a draft template for the Articles of Incorporation for a Friends group. Remember that legal requirements may vary by locality, so it's advisable to consult with legal counsel or a nonprofit expert to ensure compliance with local laws and regulations. Customize the template based on your organization's specific details and legal requirements.

ARTICLES OF INCORPORATION OF FRIENDS OF THE [NAME] LIBRARY

Article I: Name

The name of this corporation shall be Friends of the [Name] Library, hereinafter referred to as "the Friends."

Article II: Nonprofit Status

This corporation is organized and operated exclusively for charitable, educational and literary purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or the corresponding section of any future federal tax code.

Article III: Purpose

The purpose for which this corporation is organized is to support, enhance and advocate for [Name] Library, hereinafter referred to as "the Library," and to engage in activities that contribute to the welfare of the Library and the community it serves.

Article IV: Powers

This corporation shall have all the powers allowed under the laws of Virginia, including, but not limited to, the power to solicit and receive contributions; to acquire, hold, and dispose of real and personal property; and to engage in activities consistent with its nonprofit and tax-exempt status.

Article V: Membership

This corporation shall have members, the qualifications and rights of which shall be specified in the corporation's bylaws.

Article VI: Board of Directors

The affairs of this corporation shall be managed by a Board of Directors, the number, powers and qualifications of which shall be specified in the corporation's bylaws.

Article VII: Dissolution

In the event of dissolution, any remaining assets of the corporation shall be distributed to [Name] Library for the benefit of the Library.

Article VIII: Registered Office and Agent

The corporation's initial registered office shall be [Address], and the initial registered agent shall be [Name]. The Board of Directors is authorized to change the registered office and agent as necessary.

Article IX: Incorporator

The name and address of the incorporator is as follows:

[Incorporator Name] [Address] [City, State, Zip Code]

Article X: Amendments

These Articles of Incorporation may be amended by a two-thirds vote of the Board of Directors at any regular or special meeting.

In Witness Whereof, the undersigned, being the incorporator, has executed these Articles of Incorporation on [Date].

[Incorporator Signature]

[Printed Name of Incorporator]

I: Bylaws

ARTICLE I: NAME AND PURPOSE

1.1 Name

The name of this organization shall be [Friends of the Library Name], hereinafter referred to as “the Friends.”

1.2 Purpose

The purpose of the Friends is to support and advocate for the [Library Name] through fundraising, volunteer efforts, and community engagement, enhancing the library’s services and programs.

ARTICLE II: MEMBERSHIP

2.1 Eligibility

Membership is open to any individual, family or organization interested in supporting the Friends’ mission.

2.2 Membership Classes

The Friends may establish different classes of membership, each with its own rights and privileges, as determined by the Friends’ Board of Directors.

2.3: Rights and Privileges

Members shall have the right to participate in Friends activities, attend meetings, and receive regular communications. The specific rights and privileges of each membership class shall be outlined in the Friends’ policies.

ARTICLE III: BOARD STRUCTURE AND RESPONSIBILITIES

3.1 Board Composition

The Friends shall be governed by a Board of Directors (hereinafter referred to as “the Board”). The Board shall consist of [number] members, including officers.

3.2 Board Roles and Responsibilities

The Board shall have the authority to manage the Friends’ affairs, establish policies, approve the budget, and make decisions in the best interest of the Friends group and the Library.

3.3 Board Election and Terms

Board members shall be elected by the membership for a term of [number] years. The Board shall elect officers from its members. Board members may be re-elected for consecutive terms.

ARTICLE IV: OFFICERS

4.1 Officers

The Friends’ officers shall consist of a president, vice president, secretary and treasurer, who shall constitute the Executive Committee.

4.2 Duties of Officers

- President – Presides at meetings, represents the Friends and provides overall leadership.
- Vice President – Assumes the duties of the president in their absence and assists in various tasks.
- Secretary – Keeps minutes of meetings, maintains records, and handles correspondence.
- Treasurer – Oversees financial matters, maintains accurate records, and presents financial reports.

4.3 Officer Election and Terms

Officers shall be elected by the Board for a term of [number] years and may be re-elected for up to [number] consecutive terms. After their elected time has expired, they must take a one-year hiatus from serving as officers before being re-elected to the Executive Committee.

ARTICLE V: COMMITTEES

5.1 Establishment

The Board may establish committees as needed to support the organization's work.

5.2 Committee Membership

Committee members may include Board members and Friends members. The president shall appoint the committees, subject to Board approval.

ARTICLE VI: MEETINGS

6.1 Regular Meetings

The Board shall meet regularly, at least [monthly/quarterly], on a schedule determined at the beginning of each fiscal year. The date, time and location of regular meetings shall be communicated to all Board members at least [number] days in advance.

6.2 Annual Membership Meeting

The annual membership meeting shall be held in [month] each year to elect Board members, receive reports, and conduct other business as needed. Notice of the meeting shall be sent to all Friends members at least [number] days prior to the meeting.

6.3 Special Meetings

Special meetings of the Board or membership may be called by the president or upon the request of [number/percentage] Board members or general members. Notice of special meetings, including the purpose, shall be provided at least [number] days in advance.

6.4 Quorum

A quorum for Board meetings shall consist of [number/percentage] of Board members. A quorum shall consist of [number/percentage] of the total membership for membership meetings. No official business shall be conducted without a quorum present.

6.5 Voting

Each Board member shall have one vote. Decisions shall be made by a simple majority of those present unless otherwise stated in the bylaws. In the event of a tie, the president shall cast the deciding vote. Voting by proxy is [allowed/not allowed], and electronic voting procedures may be used if approved by the Board and done in accordance with the Code of Virginia § 2.2-3708.2.

6.6 Conflicts of Interest

Board members must disclose any conflicts of interest and abstain from voting on related matters.

6.7 Meeting Agenda

The president shall prepare an agenda for each meeting in consultation with the secretary. The agenda shall be distributed to Board members at least [number] days before the meeting. Members may request to add items to the agenda by submitting their request in writing to the president at least [number] days before the meeting.

6.8 Conduct of Meetings

Meetings shall be conducted per [Robert's Rules of Order or other procedural rules], ensuring that all members have an opportunity to participate in discussions. The secretary shall record the minutes of each meeting and distribute them to Board members for review and approval at the next meeting.

6.9 Open Meetings

Board meetings are open to all Friends members except when an executive session is called to discuss confidential matters.

6.10 Executive Sessions

The Board may enter into an executive session during any meeting to discuss sensitive or confidential matters, such as personnel issues, legal matters, or other topics requiring privacy. Decisions made during the executive session must be reported to the full Board at the next regular meeting.

ARTICLE VII: FINANCIAL MANAGEMENT

7.1 Budgeting

The Board shall adopt an annual budget, prepared by the treasurer, which outlines anticipated revenues and expenses.

7.2 Fundraising

All fundraising activities must be approved by the Board and conducted in accordance with the Friends' mission.

7.3 Financial Reporting

The treasurer shall provide regular financial reports to the Board and an annual report to the membership.

ARTICLE VIII: AMENDMENT PROCEDURES

8.1 Amendments

A two-thirds vote of the members may amend these bylaws present at any regular or special meeting, provided that notice of the proposed amendment is given at least [number] days before the meeting.

ARTICLE IX: DISSOLUTION CLAUSE

9.1 Dissolution

In the event of dissolution, the Friends' assets shall be distributed to [Library Name] for the benefit of the Library.

ARTICLE X: NON-DISCRIMINATION STATEMENT

10.1 Non-Discrimination

The Friends shall not discriminate on the basis of race, color, religion, sex, national origin, age, disability, sexual orientation, or any other protected characteristic in any of its activities or operations.

ARTICLE XI: CONFLICT RESOLUTION MECHANISM

11.1 Conflict Resolution

Any disputes within the Friends shall be addressed through mediation by a neutral third party, as agreed upon by the parties involved.

ARTICLE XII: RECORDS AND DOCUMENTATION

12.1 Recordkeeping

The secretary shall maintain accurate records of meetings, membership and financial transactions. Members shall have access to these records upon request.

ARTICLE XIII: COMPLIANCE WITH LEGAL REQUIREMENTS

13.1 Legal Compliance

The Friends shall comply with all applicable federal, state and local laws, including maintaining its 501(c)(3) status and filing required reports.

ARTICLE XIV: ADOPTION AND REVIEW

14.1 Adoption

These bylaws shall be adopted by the founding members' majority vote and take effect immediately.

14.2 Review

At a minimum, the Board shall review these bylaws every [number] years and propose amendments as necessary.

ARTICLE XV: ETHICS STATEMENT

15.1 Ethical Standards

All Friends members, officers and volunteers shall adhere to the highest ethical standards, including honesty, integrity, confidentiality and respect for others. Board members will be required to sign the Code of Ethics statements annually.

J: Fundraising Ideas

Here are some fundraising suggestions to spark your creativity and enhance your initiatives. Remember that there are no limits to imagination. Feel free to customize the ideas to suit your objectives and community needs. The fundraising opportunities are limitless!

IN-PERSON ACTIVITIES

In-person fundraising ideas offer interactive and engaging ways to support libraries. These ideas range from themed events like book fairs and literary costume parades to hands-on activities such as craft workshops and community dinners. These events foster community involvement and generate funds through participation fees, sales and donations.

It's important, however, that Friends groups coordinate with the library to avoid competing efforts. Ensuring that fundraising initiatives complement, rather than duplicate, library events helps maintain a cohesive strategy and strengthens the overall impact of both the Friends group and the library.

- Author Book-Signing Fair – Invite multiple authors to a book-signing fair and charge for book purchases and autographs.
- Author Lecture Series – Host a series of lectures by popular authors, selling tickets for each session.
- Author Speed Dating Event – Invite local authors to meet with attendees in a speed-dating format, where guests can purchase signed copies of books.
- Author Writing Workshop – Offer a writing workshop led by a popular author, with registration fees supporting the library.
- Book-Binding Workshop – Offer a workshop where participants learn bookbinding techniques, with a participation fee.
- Book Bingo – Organize a bingo night with book-themed cards and book-related prizes.
- Book Character Parade – Organize a parade where participants dress as their favorite book characters, with entry fees.
- Book Character Photo Booth – Set up a photo booth with props and costumes for attendees to take pictures as their favorite book characters for a fee.
- Book Sculpture Workshop – Offer a workshop where participants create sculptures from old books, with a participation fee.
- Book Swap and Shop – Combine a book swap event with a small pop-up shop selling book-related merchandise.
- Book-Themed Cooking Class – Conduct a cooking class where participants prepare dishes mentioned in famous books for a fee.
- Bookish Art Exhibition and Auction – Organize an art exhibition showcasing book-themed artwork by local artists, followed by a silent auction.
- Bookish Food Truck Festival – Organize a food truck festival with vendors creating dishes inspired by famous books.
- Bookish Quilting Bee – Organize a quilting bee where participants create book-themed quilts, with sales supporting the library.
- Children's Storybook Tea Party – Arrange a tea party for children featuring storybook characters, with ticket sales.

- Garden Book Sale and Tea Party – Arrange a garden sale featuring books and a tea party with proceeds benefiting the library.
- Historical Fiction Garden Party – Host a garden party featuring period costumes and activities.
- Interactive Murder Mystery Dinner – Collaborate with a theater group to organize a murder mystery dinner with a literary theme.
- Library Charity Auction – Auction off items donated by the community, local businesses, or authors, with proceeds going to the library.
- Library Comedy Night – Arrange a comedy night with local comedians performing book-themed routines with ticket sales.
- Library Geocaching Adventure – Create a geocaching adventure in the library and surrounding area, with entry fees.
- Library Haunted House – Transform the library into a haunted house with a literary twist, charging admission.
- Library Karaoke Night – Host a karaoke night with book-themed song choices, charging an entry fee for participants.
- Library Mini Golf – Set up a mini-golf course in the library, with each hole representing a different literary theme.
- Library Movie Marathon – Screen a series of book-to-movie adaptations in a marathon event with ticket sales.
- Library Outdoor Adventure Race – Organize an adventure race with clues and challenges scattered throughout the library and surrounding area.
- Library Outdoor Concert – Host a live outdoor concert featuring local musicians, with ticket sales benefiting the library.
- Library Outdoor Movie Night – Screen a movie adaptation of a popular book in an outdoor setting, charging admission.
- Library Plant Sale – Organize a plant sale focusing on literary-themed plant arrangements, with proceeds supporting the library.
- Library Potluck Dinner – Organize a community potluck dinner with attendees bringing dishes inspired by their favorite books.
- Library Puzzle Day – Organize a day of puzzle-solving competitions and activities with registration fees.
- Library Treasure Hunt – Organize a library treasure hunt with clues leading to hidden literary treasures, charging an entry fee.
- Library Trivia Night – Host a trivia night with questions about literature, charging teams to participate.
- Library-Themed Craft Fair – Host a craft fair featuring handmade items inspired by literature, with a percentage of sales going to the library.
- Literacy Field Day – Host a literary-themed field day with book trivia races, obstacle courses, and character-themed relays, where participants pay an entry fee.
- Literary Cookbook Project – Organize a community cookbook featuring recipes inspired by favorite books, then sell the published cookbook to benefit the library.

- Literary Costume Run/Walk – Host a fun run or walk where participants dress up as their favorite literary characters and collect pledges.
- Literary Fashion Show – Showcase fashion inspired by literature in a runway show, with ticket sales benefiting the library.
- Literary Pet Parade – Encourage participants to dress up their pets as book characters in a pet parade, with entry fees.
- Literary Pub Crawl – Partner with local pubs for a literary-themed pub crawl, with ticket sales going to the library.
- Literary Talent Show – Host a talent show where participants perform acts inspired by their favorite books or characters, with entry fees and audience voting.
- Literary Wine Tasting – Host a wine-tasting event featuring wines inspired by famous books or regions, with ticket sales.
- Literary-Themed Dinner Party – Host a fancy dinner party with a literary theme featuring book-inspired decorations, menus and entertainment.
- Literary-Themed Escape Room – Create a literary-themed escape room in the library. Participants pay to solve puzzles and follow clues through an adventure.
- Local Author Book Fair – Feature books by local authors in a book fair setting, with a percentage of sales going to the library.
- Mystery Book Box Sale – Offer mystery book boxes containing random books or a selection based on participants' preferences.
- Silent Reading Party with Donor Match – Host a silent reading event where participants quietly read, with a donor matching funds for every hour read.
- Storytelling Campfire Night – Arrange an outdoor storytelling night with a campfire, inviting local storytellers and selling tickets.
- Vintage Book Fair – Host a fair focusing on vintage and rare books, with proceeds supporting the library.

Online Activities

Online fundraising ideas leverage digital platforms to engage supporters and raise funds, offering flexible and innovative approaches like virtual events, online auctions, and digital challenges. These strategies allow organizations to reach a broader audience and maintain momentum in fundraising efforts, even remotely. Again, Friends should coordinate their efforts with the library to ensure that online initiatives complement, rather than duplicate, the library's activities.

- Digital Art Auction – Organize an auction of digital art inspired by literature, with proceeds benefiting the library.
- Digital Community Scrapbook – Compile a digital scrapbook of community stories and memories related to the library and sell digital copies.
- Digital Cookbook Project – Compile a cookbook of favorite recipes inspired by favorite books from community members and sell digital copies.
- Digital Fundraising Gala – Host a virtual gala with a literary theme featuring live entertainment, auctions and raffles.
- Online Art and Photography Contest – Hold a contest with entry fees and prizes for book-themed art or photography.

- Online Auction – Organize an auction where participants bid on donated items or experiences via an online platform.
- Online Bookish Workshop Series – Offer virtual workshops on topics such as writing, bookbinding or literary analysis, with registration fees.
- Online Cooking Class – Host a virtual cooking class where participants prepare dishes inspired by famous books, with registration fees.
- Online Crafting Class – Conduct virtual crafting classes where participants create book-themed art or crafts. Fees support the library.
- Online Fitness Challenge – Set up a fitness challenge with a literary twist, encouraging participants to raise funds through sponsorships.
- Online Reading Challenge – Set up a reading challenge where participants raise funds through sponsorships for each book read.
- Online Scavenger Hunt – Organize a digital scavenger hunt with book-themed clues and tasks, charging an entry fee.
- Online Storytelling Event – Host a live virtual event with guest storytellers, charging for tickets.
- Virtual Book Bingo – Create an online bingo game with book-related prizes and charge for participation.
- Virtual Book Club – Host a book club meeting online with exclusive guest authors or literary experts, charging a participation fee.
- Virtual Book Fair – Partner with local authors and publishers to host an online book fair, where a percentage of sales benefits the library.
- Virtual Book Swap – Set up an online platform where participants can swap books and pay a fee to join the swap.
- Virtual Escape Room – Create a book-themed virtual escape room experience with a registration fee.
- Virtual Game Night – Host an online game night featuring book-related games or trivia, with entry fees.
- Virtual Lecture Series – Offer a series of online lectures or panel discussions with authors, scholars or experts on literary topics, charging for tickets.
- Virtual Literary Festival – Organize an online festival with various virtual events, including author readings, workshops and panel discussions. Ticket sales will support the library.
- Virtual Panel Discussion – Organize a virtual panel discussion on literary topics with authors and critics, charging for access.
- Virtual Talent Show – Host an online talent show where participants showcase their talents related to literature or creativity, with entry fees and audience voting.
- Virtual Trivia Night – Set up a book- or library-themed trivia competition, charging teams an entry fee.
- Virtual Wine Tasting – Host a virtual wine-tasting event with a literary theme, where participants purchase tickets and wine packages.

Signature Events

A signature event is a major fundraising activity that defines the Friends' efforts. It's designed to draw large crowds, raise significant funds, and boost the organization's visibility in the community, making it essential for securing donations and building strong partnerships. To be most effective, it is important that the Friends coordinate with the library to ensure the event complements library programs and doesn't duplicate existing efforts, allowing both organizations to amplify their impact.

- Book-Themed Escape Room Challenge – Design escape room scenarios based on popular books or library themes. Participants solve puzzles related to literary plots and characters to “escape” within a set time.
- Charity Ball – Organize a ball with a “Classic Literature” theme. Attendees come dressed as their favorite literary characters, including a raffle with book-themed prizes and library-related packages.
- Fashion Show – Organize a “Literary Fashion Show” where local designers create outfits inspired by famous books or characters. The show will include a silent auction for book-themed fashion accessories and library support.
- Gala Dinner and Auction – Host a formal dinner with a literary theme, including a silent and live auction featuring rare books, author-signed items, and exclusive library experiences.
- Golf Tournament – Create a “Book Lovers’ Golf Tournament” where each hole has a literary theme. The tournament will feature book-related trivia challenges and prizes for the best literary-themed costumes.
- Literary Festival – Expand the festival to include a pop-up bookstore, book-themed panels on literary trends, author readings, and traditional signings and activities.
- Murder Mystery Dinner – Host a dinner with a “Library Mystery” theme. Guests solve a fictional crime in a library or literary setting, with clues hidden in book pages and literary-themed dinner decor.
- Outdoor Concert or Music Festival – Feature performances inspired by literature, such as songs based on classic novels or poems, and set up a book-themed marketplace with author signings and literary merchandise.
- Art Auction and Exhibition – Curate an exhibition of book-themed art, including pieces inspired by famous novels or literary quotes, and hold a live auction for the artwork and book-related items.
- Wine and Dine Event – Host a “Books and Bottles” evening with wine pairings inspired by famous literary works or characters. The event will include a silent auction with rare books and exclusive library events.

K: Library Bill of Rights

The American Library Association affirms that all libraries are forums for information and ideas, and that the following basic policies should guide their services.

- I. Books and other library resources should be provided for the interest, information and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background or views of those contributing to their creation.
- II. Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
- III. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
- IV. Libraries should cooperate with all persons and groups concerned with resisting abridgment of free expression and free access to ideas.
- V. A person's right to use a library should not be denied or abridged because of origin, age, background or views.
- VI. Libraries that make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use.
- VII. All people, regardless of origin, age, background or views, possess a right to privacy and confidentiality in their library use. Libraries should advocate for, educate about and protect people's privacy, safeguarding all library use data, including personally identifiable information.

Adopted June 19, 1939, by the ALA Council; amended Oct. 14, 1944; June 18, 1948; Feb. 2, 1961; June 27, 1967; Jan. 23, 1980; Jan. 29, 2019. Inclusion of "age" reaffirmed Jan. 23, 1996.

American Library Association. (Jan. 29, 2019). *Library Bill of Rights*. American Library Association. <https://www.ala.org/advocacy/intfreedom/librarybill>

Although the Articles of the Library Bill of Rights are unambiguous statements of basic principles that should govern the service of all libraries, questions do arise concerning the application of these principles to specific library practices. See the documents designated by the Intellectual Freedom Committee as Interpretations of the Library Bill of Rights. [<https://www.ala.org/advocacy/intfreedom/librarybill/interpretations>]

L: Libraries: An American Value

Libraries in America are cornerstones of the communities they serve. Free access to the books, ideas, resources and information in America's libraries is imperative for education, employment, enjoyment and self-government.

Libraries are a legacy to each generation, offering the heritage of the past and the promise of the future. To ensure that libraries flourish and have the freedom to promote and protect the public good in the 21st century, we believe certain principles must be guaranteed.

To that end, we affirm this contract with the people we serve:

- We defend the constitutional rights of all individuals, including children and teenagers, to use the library's resources and services;
- We value our nation's diversity and strive to reflect that diversity by providing a full spectrum of resources and services to the communities we serve;
- We affirm the responsibility and the right of all parents and guardians to guide their own children's use of the library and its resources and services;
- We connect people and ideas by helping each person select from and effectively use the library's resources;
- We protect each individual's privacy and confidentiality in the use of library resources and services;
- We protect the rights of individuals to express their opinions about library resources and services; and
- We celebrate and preserve our democratic society by making available the widest possible range of viewpoints, opinions and ideas, so that all individuals have the opportunity to become lifelong learners — informed, literate, educated and culturally enriched.

Change is constant, but these principles transcend change and endure in a dynamic technological, social and political environment.

By embracing these principles, libraries in the United States can contribute to a future that values and protects freedom of speech in a world that celebrates both our similarities and our differences, respects individuals and their beliefs, and holds all persons truly equal and free.

Adopted Feb. 3, 1999, by the Council of the American Library Association

Admin. (June 30, 2006). *Libraries: An American Value*. Advocacy, Legislation & Issues. <https://www.ala.org/advocacy/intfreedom/americanvalue>

M: Resources

ORGANIZATIONS:

- **BoardSource** [<https://boardsource.org/>]
 - An organization that provides resources to increase effectiveness for nonprofit boards and strengthen organizational impact.
- **Candid** [<https://candid.org/>]
 - A national nonprofit dedicated to helping other nonprofits locate funding opportunities through their grant database, Foundation Directory.
- **Center for Nonprofit Excellence (CNE)** [<https://www.thecne.org/>]
 - Virginia nonprofit organization dedicated to assisting other nonprofit organizations in the state.
 - CNE has a “Starting a Nonprofit Toolkit” that’s available for download here: [<https://thecne.org/cne-toolkits/>]
- **Library Development division of the Library of Virginia** [<https://vpl.lib.va.us>]
 - Division of the Library of Virginia dedicated to assisting public libraries across the Commonwealth to thrive as community leaders.
- **National Council of Nonprofits** [<https://www.councilofnonprofits.org/>]
 - The largest network of nonprofits in North America. Provides resources and advice on good stewardship of a nonprofit organization.
- **United for Libraries** [<https://www.ala.org/united/>]
 - A division of the American Library Association dedicated to supporting those who govern, promote, advocate and fundraise for all types of libraries.
- **Virginia Library Association** [<https://www.vla.org/>]
 - Virginia’s state library association provides support, training and advocacy efforts for libraries across the Commonwealth.

SUPPORT:

- **Public Library Consultant, Library Development division, Library of Virginia**
 - A member of the Library Development division of the Library of Virginia, the public library consultant is available to answer questions. Check the “Staff” page of the InfoCenter for contact information: [<https://vpl.lib.va.us/ldnd-staff/>]
- **Virginia Statewide Membership Access Through United for Libraries**
 - The Library of Virginia has partnered with United for Libraries to provide statewide membership access to all library staff and stakeholders. This includes access to training, toolkits, e-books, guides and free registration to their annual conference, United for Libraries Virtual, at the end of each summer.
- **Trustees, Friends and Foundations Newsletter**
 - The monthly newsletter, which began in 2022, contains information on news in the larger library world, advocacy efforts, resources and training opportunities.
 - Subscribe here: [<https://www.libraryaware.com/3744/Subscribers/Subscribe>]
- **Friends Webpage on the InfoCenter** [<https://vpl.lib.va.us/tff/friends-of-the-library/>]
 - The Library Development division of the Library of Virginia has a dedicated page on its InfoCenter where Friends groups can find information and resources.

BOOKS:

Many of these titles are available in the Library of Virginia's collection. If you're interested in reading one, contact your local library to request it through their interlibrary loan service.

■ General

- Bertinelli, L., Jarvis, M., Kosinski, K., & Wilson, T. (2020). *All Ages Welcome*. American Library Association.
- Fishel, A., Wentworth, J., & Libraries, U. F. (2020). *Proving Your Library's Value*. American Library Association.
- Reed, S. G., & Libraries, U. F. (2017). *The Good, the Great, and the Unfriendly*. American Library Association.

■ Running a Nonprofit

- BoardSource. (2011). *The Nonprofit Board Answer Book*. John Wiley & Sons.

■ Advocacy

- Chrastka, J., & Sweeney, P. P. (2019). *Before the Ballot*. American Library Association.
- Sweeney, P. "PC," & Chrastka, J. (2018). *Winning Elections and Influencing Politicians for Library Funding*. American Library Association.

■ Fundraising

- Kihlstedt, A. (2017). *Capital Campaigns: Strategies That Work*. Jones & Bartlett Publishers.
- De Farber, B. G. (2021). *Creating Fundable Grant Proposals: Profiles of Innovative Partnerships*. ALA Editions.
- Gerding, S. K. (2024). *Winning Grants, Third Edition*. ALA Editions.

LEGAL INFORMATION:

■ 501(c)(3) Compliance

- Virginia nonprofits must ensure their operations align with federal requirements to obtain and maintain federal tax-exempt status under IRS Code Section 501(c)(3). This includes adhering to rules regarding political activities, lobbying and reporting.
- Forms must be filed each year to maintain status.
<https://www.irs.gov/charities-and-nonprofits>

■ Compliance Guide for 501(c)(3) Public Charities

- Officially designated as Publication 4221-PC (Rev.3-2018), this document outlines all federal IRS rules and regulations for 501(c)(3) nonprofit organizations to ensure compliance.
<https://www.irs.gov/pub/irs-pdf/p4221pc.pdf>

■ Employment Laws

- When hiring someone to work for the Friends, nonprofit organizations in Virginia need to follow state employment laws, such as wage rules, workers' compensation, unemployment benefits, anti-discrimination regulations, etc.
<https://www.vec.virginia.gov/employers/employment-law-guide>

- **Virginia Freedom of Information Act**
 - Nonprofit organizations that receive public funding or carry out government duties may also be subject to FOIA requests, which demand openness in their activities. This may or may not apply to your organization.
 - Virginia nonprofit organizations are not explicitly mandated to adhere to the state's open meeting regulations. However, Friends groups should do so, given their strong connection to the library, as the public may need help to differentiate between the Friends group and the publicly supported library. Abiding by open meeting laws is crucial for upholding transparency and building public confidence.
<https://law.lis.virginia.gov/vacode/title2.2/chapter37/>
- **Virginia Nonstock Corporation Act**
 - Regulates how nonprofit organizations are established, operated and dissolved in Virginia. Nonprofits must adhere to the guidelines outlined in this act, which includes submitting articles of incorporation to the Virginia State Corporation Commission (SCC).
- **Virginia Privacy and Data Protection Laws**
 - Nonprofit organizations need to keep records of their financial dealings, meetings held by the board, and other important events. These records should be available for examination by the board members and, in certain instances, by the public or government agencies. Two primary laws in Virginia are the Virginia Consumer Data Protection Act (VCDPA) [<https://law.lis.virginia.gov/vacodefull/title59.1/chapter53/>] and the Personal Information Privacy Act [<https://law.lis.virginia.gov/vacodepopularnames/personal-information-privacy-act/>].
- **Volunteer Protection Act of 1997**
 - This act provides certain protections to volunteers, nonprofit organizations and governmental entities in lawsuits based on the activities of volunteers.
<https://www.govinfo.gov/content/pkg/PLAW-105publ19/pdf/PLAW-105publ19.pdf>
<https://law.lis.virginia.gov/vacode/title13.1/chapter10/>
- **Virginia Sales and Use Tax Exemption**
 - Nonprofits may apply for an exemption from Virginia sales and use tax for purchases to further their mission. This requires an application to the Virginia Department of Taxation.
<https://www.tax.virginia.gov/sales-tax-exemptions>



LIBRARY OF VIRGINIA

Library Development
800 E. Broad St., Richmond, VA 23219
www.lva.virginia.gov