



N64W23820 Main Street
Sussex, WI 53089-3122
(262) 246-5180
phplonline.org

Agenda

**Pauline Haass Public Library Board of Trustees
Wednesday, October 19, 2022, 6:30 p.m.
Library's Quad/Graphics Meeting Room, off lobby**

- 1) Roll call
- 2) Consideration of, and possible action on, minutes of September 21, 2022 Board meeting.
- 3) Comments from citizens present
- 4) Communications received by Board members or Director
- 5) Financial report
- 6) Action on bills
- 7) Director's report on library services, legislative issues, staffing, funding, system services, continuing education, building issues, library users, technology, planning, Friends of the Library and Foundation activities, legal issues, and budget.
- 8) New Business:
 - a) Capital Plan Update: discussion and possible action
 - b) Upcoming Holiday Hours: discussion and possible action
 - c) Policy – Library of Things Usage: discussion and possible action
 - d) Review of Trustee Essentials: discussion
- 9) Items for future agendas: discussion
- 10) Adjournment

Lisa Bougie, President

Adele Loria, Library Director

Attendees: Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information or to request this service, contact Adele Loria at 262-246-5180.

Minutes of September 21, 2022 Board meeting
Pauline Haass Public Library

Called to order: 6:32 p.m.

Roll call: Bougie, Carran, DeLonge, Hacker, Jilling, Roubik, Vande Hei, Wegner, Zoellick present. Absent: Kojis and Schultz.

Bougie; Jilling motion to accept minutes of August 17, 2022 Board meeting as presented; motion carried.

Comments from citizens present: none.

Communications received by Board members or Director: none.

New Business:

Christine DeMaster of Trilogy Consulting presented on the Impact Fees; no action taken.

Financial report: Revenue and Expenditure Guidelines for August 2022 accepted as presented by Vande Hei/Carran motion; motion carried.

Prepaid bills in the amount of \$678.61, P-Card bills in the amount of \$4,170.96, September 2022 bills in the amount of \$12,699.30, August expenses in the amount of \$73,490.96 approved as presented by Vande Hei/DeLonge motion; motion carried.

Director's report: Loria reviewed the items in her written report and other items as followed by the agenda.

New Business (continued):

The board reviewed the update on the 2022 Strategic Plan Activities; no action taken.

Meeting adjourned at 7:32 p.m. by Roubik/Vande Hei motion.

Respectfully submitted,
Adele Loria
Library Director

Minutes prepared by Lisa Ponto, Administrative Services Manager

October 19, 2022

Director's Report to Library Board

Agenda Items

Capital Plan Update: In April, we reviewed the Capital Plan, which serves to identify and cost out our foreseeable capital expenses; to assure that we have the money for each item at the time it is needed; and to identify a revenue stream from the Village of Sussex that will allow that while eliminating spikes in their budget. At that time we agreed to revisit the plan and decide on 2023 projects once the FEH project was complete and we had more time to consider the recommendations that would impact our Capital Plan, whether facility improvements or short-term solutions. I will bring copies of the plan to our October meeting for discussion and review, as the format is easier to view in print. Under consideration for 2023 are the following projects:

- Make the family bathroom in the lobby accessible. This is a good interim measure until we can plan to make all bathrooms accessible, because the cost/impact is relatively low and because it will ensure we have a fully accessible bathroom that is available to anyone using the library.
- Teen furnishings project: the planned 2022 project was put on hold after we received short-term recommendations from FEH that would relocate and/or change the footprint of this area. During the meeting we will discuss whether we want to expand this project to include some of those changes, modify the scope of the project, or delay it further.
- Building perimeter sealant replacement in targeted areas identified in FEH Facility Study
- Installation of security camera system

Upcoming Holiday Hours: This upcoming December 31, we are currently scheduled to be open from 9:30 to 4:00 as usual on a Saturday. While New Year's Eve is not a paid holiday for the library, we typically close early at 5:30 PM. I'd like to propose that the board consider either closing entirely for that day or closing early at 1:00PM. Historically, that is a very low day for circulation and I think that most people will expect the library to be closed; only 6 of the 24 Bridges libraries are planning to be opened that day and the Village of Sussex is closed all of the Friday beforehand. Since setting library hours (with the exception of emergency closings) is a board action, I've included this for discussion and action this month.

Policy – Library of Things Usage: Later in this report you'll find an update on the Library of Things Collection, which will soon include kitchen items and passes to local area attractions. We have been working on policies and procedures for these specialty items. Rachel, Jennifer, Jennie, and I have met throughout September and October to work on this. The Technical Services Department toured The Thingery at Mukwonago Public Library and spoke to the staff

about their experiences, and we have used that information to inform our own procedures. The draft policy is included in this month's packet for your review. If adopted, we will also need to revise the Circulation Policy to reference this where needed.

Review of Trustee Essentials: Included in your packets is "TE23: Dealing with Challenges to Materials and Policies." While we don't currently have a formal challenge at our library, there have been a couple of them at Bridges libraries in recent months and a large number nationwide, so it makes sense to review and discuss this guidance for handling challenges.

Non-agenda Items

Presentation to Village Board: On Monday, October 10 during the Village Board's Budget Workshop focusing on the Capital Improvement Plan, I provided an update along with Christy Monk and Aaron Davis on the work that PHPL has done with FEH in the past year. President Bougie and Trustee Hacker were both present, and of course Trustee Zoellick was there in his capacity as a Village Trustee.

Building Updates: We had the sealant redone on the south-facing windows in the first week of October. Jeff Goodyear oversaw this work and everything went smoothly.

In addition to the issues I detailed in my email last week, we had an electrical issue this past weekend when water (from the HVAC and plumbing issues) pooled in a floor outlet and the breaker failed to trip. Thankfully the staff working on Saturday – Jennie Bahnaman and Kathy Duvall – noticed the outlet smoking and called the fire department, who turned off the breaker after staff cleared the building. Mark Eesley was working next door and arrived quickly, and he then removed the outlet and capped the wire. The fire department gave us the all-clear to allow people back in the building and resume services for the rest of the day. On Monday morning, we had an electrician come out to replace the breaker and assure the new outlet was properly grounded.

Circulation: Circulation was up again from 2021 in September (about 10%), and YTD overall it is up almost 8%.

Library of Things Update: We are in the process of adding kitchen items to our Library of Things Collection. We decided on an electric knife sharpener, a vegetable spiralizer, a pasta maker with collapsible pasta drying rack, ice cream maker, and a waffle cone maker. Sue Posh has been scouring the internet and employing considerable resourcefulness to come up with packaging solutions for these many-sized objects that will hold up to frequent transport and keep our collection looking consistent and professional. Kitchen items will be available before the end of October.

We've also made progress on circulating passes to local area attractions, as I described in my email to you last week. We hope to introduce these even earlier than our goal of January 2023.

Marketing and Public Relations: Things picked up once more in September as fall programs launched. Becca Werginz organized a social media campaign for **Library Card Sign-Up Month**, and PHPL received a number of stickers from Bridges to use for outreach and marketing. They can be used as bumper stickers, laptop stickers, etc. Every new cardholder during the month of September received one in celebration of Library Card Sign-Up Month.

As of September 1, Teresa Douglas launched our first monthly children's newsletter using LibraryAware. Teresa reports that she finds the new program relatively easy to use and that the transition from the old program to the new should have been seamless and unnoticeable to our newsletter recipients.

Professional Development and Continuing Education: On September 23, Val Johnson attended "Not in My Library: Challenges to Library Materials and Public Policy." Presenter Laura Sanders clarified that supporting intellectual freedom is not a neutral stance, putting librarians in a challenging place if we are to champion intellectual freedom, our ethical responsibility as public librarians. She also reminded us that the presence of a book in a collection does not mean that the library advocates the position of the book. Finally, she encouraged going to public community meetings to explain the library's larger purpose and mission because there is a general misunderstanding of how libraries operate and what they represent.

Victoria VanZile took a 2-hour "Graphic Design Crash Course" offered by the SEWI Libraries Continuing Education group on September 29. She learned about the concepts of design, writing, and workflow of graphic design. Design points useful for her work at the library are the rule of thirds for focal points and the rule of odds, and writing tips included the use of power words and questions.

On Friday, October 14, PHPL hosted the APL meeting of directors from the Bridges libraries along with Bridges system staff.

Strategic Planning: Our first Strategic Planning Meeting is scheduled for Tuesday, October 25.

Jennie Bahnaman, Assistant Director/Adult Services Manager and Becca Werginz, Adult & Teen Services Librarian, report on Adult and Teen Services activities for August 2022:

Adult Programs & Services

Caleb Jenks, Wildlife Educator from the Horicon Marsh Education and Visitor Center, gave a presentation of the **Horicon Marsh Story** at our library on Thursday, September 8. He shared the incredible conservation history of the Horicon Marsh and information about the amazing wildlife that lives there. In our follow-up program survey, many patrons expressed that they really enjoyed the presenter and his engagement with the audience. We had 34 people in attendance.

We also hosted Jennie Radmer from the Waukesha County ADRC and the Greater Wisconsin Agency on Aging Resources, Inc. again this year for the **Maximize Your Medicare Benefits** presentation on Thursday, September 22. This was purposefully offered in September in preparation for Medicare Open Enrollment starting in October. We had 23 people in attendance.

Rachel Ruetz (Technical Services Manager) led our **September Make It!** program where attendees made a cozy braided pumpkin. In our follow-up program survey, patrons had glowing reviews of what they most enjoyed about this program: *“Gathering with folks, learning new techniques, and exploring the library,”* and *“The leaders have always done a great job of demonstrating or explaining and seem to help create a nice, relaxed atmosphere. Available to answer questions. Loved my finished project!”* And a patron expressed an overall love for our Make It! programs: *“This is an incredible series. We love it. Thank you.”* We had 27 people in attendance, with a long waitlist of interested patrons. (An attendee shared a photo of the completed craft on the library's Facebook page - photo included here.)



On September 6, 5 members of the **Tuesday Afternoon Book Club** met to discuss *One Thousand White Women: The Journals of May Dodd* by Jim Fergus. The following day, 12 members of the **Mystery Book Club** returned from their summer hiatus to read and discuss *The Dry* by Jane Harper. On September 21, 11 members of the **Wednesday Afternoon Book Club** met to discuss *The Only Woman in the Room* by Marie Benedict.

During September we were busily planning for the Winter/Spring 2023 event schedule, as the deadline for submission to the Village of Sussex Activity Guide is at the beginning of October. The **Friends of Pauline Haass Public Library** are sponsoring 2 of our adult programs for 2023 which includes a performance by Irish traditional musicians **Ceol Cairde (Music of Friends)** on Thursday, March 16, and local author **Doug Schmidt** who will share the **history of Milwaukee baseball** on Thursday, April 20.

StoryCorps Update



**Your Service.
Your Story.**

Your Story Matters.

You're invited to record your military service story with a loved one for a new oral history project at the Library. Your story will be preserved and shared for future generations.



StoryCorps is a national nonprofit organization that records, preserves, and shares meaningful stories in order to build connections and create a more just and compassionate world.

Angela Meyers (Coordinator of Youth and Inclusive Services - Bridges Library System) and Becca Werginz (Adult & Teen Services Librarian) have been collaborating with nearby libraries to create a special set of recording opportunities for veterans in honor of Veterans' Day. Between November 7-11, recording opportunities will be available to local veterans and their loved ones to share their military stories at the Menomonee Falls Public Library, Pauline Haass Public Library, and Brookfield Public Library. Registration is available at www.bit.ly/VeteransRecording.

Library Memory Project Update:

The Library Memory Project led by Angela Meyers, Coordinator of Youth and Inclusive Services for Bridges Library System, held its first one-day conference at the Oconomowoc Community Center on September 21. Jennie Bahnaman attended to represent PHPL. We learned about the origins of Memory Cafés in the United States and Wisconsin from Dr. Susan McFadden who started the Fox Valley Memory Project and was very influential in bringing Memory Cafés to Wisconsin. The Waukesha County ADRC gave a presentation on Dementia 101. Angela Meyers shared the history of our local Library Memory Project and how it came to be. We shared stories of what has and hasn't worked for us at our Memory Cafés, and also learned about effective ways to promote our Memory Cafés.

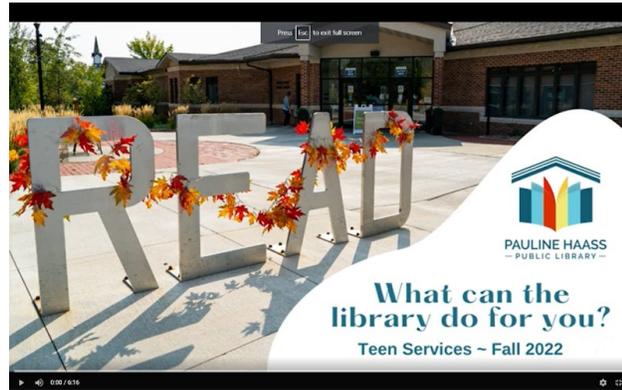


Teen Programs & Services

Twenty-nine teens voted in this month's **Vote by Sticker** program, which asked if you'd rather speak every human language or be able to speak to animals. Speaking every human language won by a single vote!

In September, Becca fulfilled 27 **Library Loot Box** requests. Each box contained three books (chosen specially for each teen based on their interests), a snack, and a DIY pipe cleaner pumpkin craft.

Fall program brochures and a promotional video have been distributed to both **Templeton Middle School** and **Hamilton High School**. Thank you to the school librarians, Jacque and Anita, for always being willing to promote the public library!



Valerie Johnson, Children’s Services Manager, and Teresa Douglas, Children’s Librarian, report on Children’s Department activities for September 2022:



Around the Department

In September our children’s department transformed from the summer theme to our new autumn look: Associate Katie Mueller created a new 3-dimensional bulletin board featuring four charming gnomes and we added a cozy mushroom reading tent to the preschool play area. At the small (preschool) tables are new puzzles and interactive activities. Kids have been embracing these fresh features with enthusiasm. As always, we strive to make the children’s department a magical place of delight and discovery!



Programs

The fall storytime season has started, and for the first time since the pandemic we are offering storytime indoors with no required registration. Our storytime guidelines poster and handouts have a fresh, new look and help to educate newcomers about storytime structure and expectations. Attendance has been very good, reaching a manageable 40-50 people per session. Storytime is offered three mornings per week for approximately 30 minutes of read-aloud stories, songs, felt board rhymes, and movement & dance. Kids are sent out with a simple take-home craft. We encourage families to drop in at their convenience to one of the three sessions because the same program is repeated. This way families are not obligated to a scheduled day and can easily adapt if mornings at home do not go as planned.

Fall **LabCrafts** in the KidsLab kicked off with a piñata-making project that required kids to do some cardboard construction. Under the guidance of children's associate MJ Jorn, they built a variety of shapes, animals, and mermaid tails (!) covered with traditional colored tissue paper fringe. While the KidsLab is open for many hours for kids to freely tinker and explore their own projects, the LabCrafts program gives them the chance to work on a STEAM project under the guidance of a librarian together with other kids their age.



Dog owner Dan Babe is back this fall with Dakota, our beloved reading dog, to donate his time on select Thursday evenings. **Doggy Tales** allows elementary aged readers to log some read-aloud time while simultaneously petting and cuddling our favorite shaggy pup. Dan himself provides a five-minute lesson on how to approach a new dog and what to expect from Dakota during the session. For example, do not despair if Dakota dozes off; he is still listening!

Community Involvement

Touch a Truck happened Saturday, September 10, and the library was there! Excitement runs high at this event. Kids touch, climb, and get into and out of every shape of truck and vehicle that the Village of Sussex staff can round up. Horns honk, buckets raise and lower, hoses spray, and a helicopter lands! Grownups in every uniform imaginable worn by first responders, construction operators, military drivers, and more are there enjoying the interaction with the kids. Once again, children's staff supported this annual Village of Sussex event by supervising the placing of handprints on the snowplow! The concept is that the prints remain until the first big snow, when—thanks to the hard work of all these kids—the snow turns the colors of the

rainbow! (n.b.: tempera paint is non-toxic and water-soluble.) The library also manned a tent for kids to pick up free rolling racecar grab-and-go craft kits and vehicle-themed coloring books assembled by children's staff, and mini boxes of colored pencils or crayons. Children's staff Val Johnson and Katie Mueller were assisted by volunteers Caroline A. and Adam S., without whose help we would not have been able to keep up.



On Wednesday, September 30, Teresa Douglas and Victoria VanZile attended the 2nd annual **Activity Fair at Woodside Elementary School**. This activity fair is open to community groups sponsoring sports, clubs, and other activities so parents can come and learn about all that is offered in one stop. Miss Teresa and Miss Victoria, as the kids know them, were there to promote fall programs to families, to distribute program guides, and to talk to first grade families about Firsties, which starts in October. Many parents were excited to see the library represented and to learn of our programs and many regular library patrons just stopped by to say hello. Altogether 110 people stopped at the table and talked with our librarians.

Professional Activities

On August 9, the youth services staff met to go over the highs, lows, and lessons learned from this year’s summer reading program. Frankly, there were no lows—this was a great year which held a positive, excited vibe throughout the season! Technically, our 2022 Summer Reading Program was not over, but plans for 2023 were discussed at the meeting. We have discovered it is best to do it this way, while thoughts and ideas are fresh in our minds. We always cover “what to avoid next year” and “what will make next year even better than this year” at these meetings.

Collection

Patrons continue to utilize the staff-created book lists available in the department (as well as on our website) in order to locate titles based upon favorite topics. The most frequently replenished lists for older kids are *Great Read-Aloud Chapter Books*, *What to Read Next if You Loved Percy Jackson*, and *Funny Fusions*. For the picture book reader our most popular lists these days are *Dinosaurs*, *Things That Go*, and *Boo! Monstrously Good Picture Books*. Thematic lists are one way to make picture book collections accessible to users. According to a recent article in *School Library Journal* (“Make Picture Books Browseable” by Rachel G. Payne; September 2022), organizing picture books is a challenge because organizing by theme can lead to confusion while traditional organization by author is difficult for patrons who often do not think of books in terms of favorite authors. In our case, our shelving does not lend itself well to organizing picture books by theme. According to the article, one strategy for helping patrons find the books they seek in an author-alphabetical collection is to provide thematic lists such as the ones we offer. On one recent day this past month two families visiting the library complimented our booklist collection and eagerly chose several lists apiece.

Children’s book bundles	number of bundles	number of items in bundles
staff-created book bundles	59	302
special request book bundles	1	9
Total	60	311

Statistics

Adult & Youth Reference	Totals
Youth Reference Ques.	345
<i>Youth Information Ques.</i>	9

Adult Reference Ques.	526
<i>Adult Information Ques.</i>	6
One-on-One Tech Help	16
Value Line use	1
Study Rooms use	69
Faxes	20
Requests for Experience Passes (Zoo, Domes, etc)	9

Children's Programs	Virtual Attendance	In-person Attendance	Self-Led (Passive)
Family Storytime (12 sessions)		492	
Family Storytime grab and go craft			259
Doggy Tales (2 sessions)		6	
KidsLab usage			4
LabCrafts (1 session)		26	
Touch a Truck - handprints participants		442	
Touch a Truck - grab and go kits			502
Noah's Ark Outreach		28	
Activity Fair at Woodside Elementary		110	
1000 Books Before Kindergarten new registrations			9

Firsties other video views (past videos)			25
Total		1,104	799

1000 Books Before Kindergarten total books read: 1,881

Teen Volunteer hours for August: 17

Adult/All Ages Programs	Virtual Attendance	In-person Attendance	Self-Led (Passive)
Tuesday Book Club (9/6)		5	
Wednesday Book Club (9/7)		12	
Horicon Marsh Story (9/8)		34	
Wednesday Book Club (9/21)		11	
Maximize Your Medicare Benefits (9/22)		23	
Make It: Cozy Braided Pumpkins (9/28)		27	
Total		112	

Teen Programs	Virtual Attendance	In-person Attendance	Self-Led (Passive)
September Library Loot Boxes			27
Vote by Sticker: September (9/1-9/30)			29
Total			56

Jennifer Steffes, Circulation Manager, reports on Circulation activities for September 2022:

After a very busy summer in circulation, the circulation department was able to begin work on a few projects in September: straightening/shelf-reading, shifting in adult non-fiction, organizing the circulation workroom, and making room for the growing LoT Collection. September itself was busy in circulation with just over 2,400 more physical items checked out than last September; a significant year-over-year increase! Staff enthusiastically promoted Library Card Signup month with new patrons.

Rachel Ruetz, Technical Services Manager, reports on Technical Services activities for September 2022:

On Thursday, September 8th, Sue Posh, Anna Oleszczak, Rachel Ruetz and Circulation Manager Jennifer Steffes visited Mukwonago Public Library to speak with Technical Services Librarian Mary Jo Isely and her staff members about their Library of Things, called “The Thingery.” We spent a couple hours touring the collection, taking photos and asking many questions as everyone gave us vitally important advice as we begin to acquire more elaborate items for our Library of Things.

As of this monthly report, I will no longer be reporting on the number of items encoded with RFID tags, since there are less than 100 total items that still need to be tagged in the entirety of the collection.

Statistics:

Items processed	565
Volunteer hours (including RFID, processing, and managing the book sale room)	21.5

STATISTICS FOR MONTH OF SEPTEMBER, 2022

	Sept. 2022	Sept. 2021	YTD	YTD 2021	% change
ALL CIRCULATION	28800	27453	266351	248690	7.1%
PHYSICAL MATERIAL CIRCULATION	25654	23214	237039	219845	7.8%
E-MATERIAL DOWNLOADS	3146	4239	29312	28845	1.6%
HOURS OPEN	237.5	246.5	2161	1985	8.8%

	YTD
HOLDS FILLED FOR PHPL BY OTHER CAFÉ LIBRARIES: -	2724
HOLDS FILLED FOR OTHER CAFÉ LIBRARIES BY PHPL : +	2145
Crossovers to PHPL from other library communities: +	5980
Crossovers from Sussex to other CAFE libraries: -	630
NET LENDING: 4771	41486

PHYSICAL CIRC:	Sussex	Other	TOTAL	2021
	9705	15949	25654	23214

Cards issued:	83
Reference questions answered:	871
Informational questions answered:	15
Library visits this month:	7,720
Materials purchased:	528
(year to date total:)	5891
Study Room usage:	69
One-on-one technology lessons:	16
Fax Service:	20
Value Line:	1
Curbside pickup:	11

Meeting Room Use:

Quad Room:	20
Small meeting room:	7

INTERNET USE*:	333	sessions
TOTAL HOURS**:	194:23:00	
AVG. SESSION**:	35.024	minutes
WI-FI INTERIOR*:	1272 clients	
WI-FI EXTERIOR*:	330 clients	

*includes wireless network

**wired access only

POLICY: Library of Things Collection Usage

Adopted by the Library Board:

The Library of Things (LoT) is a collection of non-traditional items supporting the library's mission to "connect people to information, ideas, and one another" through tools and hands-on experiences.

Eligible Borrowers

A CAFÉ library card in good standing (fines under \$10) is required to borrow an item from the Library of Things. All borrowers must abide by the Pauline Haass Public Library Circulation Policy. **Some items, including wifi hotspots, kitchen implements, and Explore Passes to local area attractions, are only available to borrowers in good standing over the age of 18.** An agreement signature may also be required for checking out these items.

Borrowing Limitations and Rules

Many Library of Things items may be placed on hold for pickup at Pauline Haass Public Library. **Some items, including Explore Passes and Lucky Day Hotspots, cannot be held and are subject to additional borrowing limitations to ensure fair use and access to the entire community.** Please see the end of this policy for the rules and limitations on specialty items.

- All Library of Things items must be returned to the Pauline Haass Public Library at the Circulation Desk during normal library hours. A \$5.00 charge will be assessed for items returned to another library or in the book drop.
- Most items can be checked out for one (1) week and renewed once if there is no waiting list. Special loan periods apply to specialty items.
- For most items, the overdue fee is \$1.00/day. Special overdues apply to specialty items (Explore Passes \$50/day, Lucky Day Hotspots \$5/day).

Proper Use & Liability

Borrowers agree to replacement or repair costs if item is returned damaged, a piece is missing, or item reported as lost or stolen. Replacement and repair costs vary by item.

Items are expected to be returned clean and in good condition. Cleaning costs may apply to specialty items.

The borrower is solely responsible for Library of Things items and will be billed for reasonable repair or replacement costs associated with any damage or loss. The library has sole discretion in making these decisions. Replacement costs are based on current retail prices.

The library is not responsible for any injury, loss, or damage that may occur from use.

Patrons are expected to use the items only according to the instructions provided by the Manufacturer.

Specialty Items

1.) Explore Passes (Circulating passes to local attractions)

- a. Borrowers must be 18 or over, in good standing, and show photo ID that matches their library card at checkout.
- b. Passes may be checked out for three (3) days and may not be renewed.
- c. A patron may borrow only one pass at a time.
- d. A pass must be returned to the library for at least one week before being checked out by the same patron.
- e. \$50 per day overdue fine. There is no grace period.

2.) Kitchen Implements

- a. Items must be clean upon return. A \$5.00 cleaning charge will be assessed if items are returned dirty.
- b. Problems with usage (equipment malfunctioning) should be reported at return. Borrowers are responsible for

3.) Lucky Day Hotspots (2-week checkout period)

- a. Hotspots must be returned to the shelf for 24 hours before being borrowed again by the same patron.
- b. A patron may borrow only one hotspot at a time. Exceptions may be approved by the library director.

Dealing with Challenges to Materials and Policies

23

One of the most difficult tasks you may face as a public library trustee is that of dealing with an objection to materials in the library's collection, or an objection to library policies.⁵ This is why it is essential for every library to have a written policy in place that specifies how complaints will be handled, including a procedure to be used by concerned citizens.

The Challenge Policy

The policy should be written so that it calls for at least the initial steps of the process to be handled by staff; and in many, if not most, instances the issue can be resolved at that level. However, there may be times when the library board becomes involved more directly. Again, what is most important is for the board to have a policy and a corresponding procedure for dealing with either circumstance.

Regardless of the level of board involvement, it is important for you as a trustee to be committed to the principles of freedom of expression and inquiry that are fundamental to the role of public libraries. The entire community benefits collectively when democratic institutions uphold the right of access to information. Public libraries are for everyone and for every inquiry, and as such must include materials with varying points of view and a wide range of subjects. However, throughout history there have always been those who seek to limit what others may read, see, or listen to, and when this occurs in a public library setting it must be addressed thoughtfully and carefully by those ultimately responsible for all library operations, i.e., the library board.

When you became a library trustee, you may already have had considerable knowledge about intellectual freedom and censorship. However, many trustees need to learn more about these issues so that if an objection is raised they will be prepared. There are many resources; one of the most complete is the *Intellectual Freedom Manual* published by the Office for Intellectual Freedom of the American Library Association. The manual is updated frequently, and your library should have a copy of the latest edition. Other resources are listed at the end of this *Trustee Essential*. (See also [Trustee Essential #22: Freedom of Expression and Inquiry](#).)

In This Trustee Essential

- The need to have a written policy to deal with challenges
- Your responsibility as a trustee in a challenge

⁵ While this *Trustee Essential* focuses primarily on complaints or challenges to materials, a similar procedure can be used for objections to library policies such as those governing use of meeting rooms, the Internet, etc.

The Trustee Role in Dealing with Challenges

So what is your role when a complaint against a specific book, music CD, DVD, or policy is made? In many communities (especially smaller ones) you may receive the complaint personally through a phone call or a face-to-face conversation rather than as an item of business at the next board meeting. If this happens, you will be better able to respond appropriately if there is a policy and procedure already in place.

An important first step is to communicate with the library director about the complaint, since you and your fellow trustees have, no doubt, delegated to the director the responsibility for selecting materials. This means that you should not express your own personal views to an individual citizen, but should instead refer the complaint to the director promptly. Inform the citizen that there is a policy for handling objections, and explain that you are not individually responsible for deciding what will be done. Make sure the objector understands there is a process, and that he/she has the right to use that process. See the attached *Sample Complaint/Concern Form*, which includes a sample policy for dealing with complaints.

In other instances, the complaint may be made directly to the library director, either orally or in writing. In both cases, the objection may become a formal challenge if it cannot be resolved through informal dialog. You and your fellow trustees should be informed by the director that a challenge has been received and kept informed of the steps in its resolution. Or the trustees may receive a challenge as a formal item of business, and the process will start from that point.

If a formal challenge has been received, it may become known to the general public, sometimes generating debate in the media and among other public officials. This can create great stress for library trustees, for you may be contacted for your opinion by members of the public or by the media, or even by members of the municipal board which confirmed your appointment. Again, it is your responsibility not to engage in public debate as an individual. Your library's policy for dealing with challenges should specify that all deliberations involving trustees will be made at open board meetings; it should also specify that there is an official spokesperson (often the library director, sometimes the board president) through whom all information will be given out, especially to the media.

Public Hearings

Most challenges are resolved before they become issues of public debate. Depending on your challenge policy, occasionally the library board may decide to hold a public hearing at which testimony is taken. This process must be carefully and thoroughly crafted to allow both sides of the issue to be heard, and to prevent (as much as possible) undue sensationalism. (The *Intellectual Freedom Manual* has an excellent section on planning a public hearing.) While the steps of this process need not be spelled out in your library's policy, there should be a statement that refers to the process.

If a hearing is held, it is important for trustees to listen as carefully as possible and not to participate in the debate. They should also defer any decision on the challenge until a later meeting. This meeting should be scheduled fairly soon after the hearing but allow enough time for trustees to consider the issues that have been raised in a less emotional atmosphere.

Regardless of how the challenge ultimately arrives before the trustees, it is probable that you will eventually make your views known through a vote that will decide the outcome. This is the time to make a public statement giving the reasons for your vote. Such a statement is not obligatory, but it gives trustees a forum to reiterate the principles of intellectual freedom, and why you do (or do not) support them in this instance. Once the board has decided the outcome, there is usually no further recourse for action by the challenger except a court case.

A formal challenge can be an opportunity for growth for all parties: the challenger, the library director and staff, and perhaps most of all for trustees. Having a policy in place that describes the process to be followed and the responsibilities of the various participants in a challenge will make it much easier for you and your fellow board members to deal with attempts at censorship.

Discussion Questions

1. Why is it important for a library to have a policy for dealing with challenges to library materials and policies?
2. Does your library have an adequate policy and procedure for handling challenges? Are there any ways your policy and procedure could be improved?

Sources of Additional Information

- Attached [Sample Complaint/Concern Form](#)
- Intellectual Freedom Manual, latest edition, published by the Office for Intellectual Freedom, American Library Association
- Your library system staff (See [Trustee Tool B: Library System Map and Contact Information.](#))
- Children's Cooperative Book Center Intellectual Freedom Information Services, University of Wisconsin-Madison (for challenged children's materials) at <http://ccbc.education.wisc.edu/freedom/ifservices.asp>
- Division for Libraries and Technology staff (See [Trustee Tool C: Division for Libraries and Technology Contact Information.](#))

Trustee Essentials: A Handbook for Wisconsin Public Library Trustees was prepared by the DLT with the assistance of the Trustee Handbook Revision Task Force.

© 2002, 2012, 2015, 2016 Wisconsin Department of Public Instruction. Duplication and distribution for not-for-profit purposes are permitted with this copyright notice. This publication is also available online at <http://dpi.wi.gov/pld/boards-directors/trustee-essentials-handbook>

Sample Complaint / Concern Form *

Your complaint or concern is about (please check):

- Book
- Audio item
- Video item
- Internet website
- Library policy
- Other, please explain:

Please indicate (if relevant):

Title:

Author/Producer/URL:

What is your concern about this material, resource, or policy? (Please tell us all you can to help us understand your concerns.)

Please print your name and address:

Signature: _____

[On the back of the form, include the board-approved policy for dealing with written complaints about materials. See the next page for an example.]

* Sometimes called a material reconsideration or challenge policy.

Sample Board Policy for Handling Material Complaints / Concerns

The library director (or staff responsible for selecting materials in this area) will:

1. Examine the material, reviews, and other information about this title or similar titles.
2. Decide whether the item should be kept, moved to another section of the library, or withdrawn.*
3. Write the person who filed the complaint with a decision and explanation within ____days of receiving the complaint.

If the person who filed the complaint is not satisfied with the decision, he/she can appeal to the library board. Upon receiving an appeal, the board will:

1. Set up a committee with board members, library staff, and/or community members to examine the material.
2. Consider the committee's recommendation to the board.
3. Hold a public hearing if deemed desirable by the board.
4. Make a final decision on the material.*

*The U.S. Supreme Court has ruled that officials may not legally remove materials from a library collection "simply because they dislike the ideas contained in those books and seek by their removal to prescribe what shall be orthodox in politics, nationalism, religion or other matters of opinion."

Trustee Essentials: A Handbook for Wisconsin Public Library Trustees was prepared by the DLT with the assistance of the Trustee Handbook Revision Task Force.

© 2002, 2012, 2015, 2016 Wisconsin Department of Public Instruction. Duplication and distribution for not-for-profit purposes are permitted with this copyright notice. This publication is also available online at <http://dpi.wi.gov/pld/boards-directors/trustee-essentials-handbook>