Florida Library Association

Standards for Florida Public Libraries
2004
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2004

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Endorsements

Two Florida organizations representing county and municipal officials have endorsed these standards: Florida City and County Management Association (FCCMA) and Florida League of Cities, Inc.

PDF format copies of the endorsement letters are available at

- http://www.flalib.org/publications/FCCMAendorse.pdf (FCCMA)
- http://www.flalib.org/publications/FLCendorse.pdf (FLCA)

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Introduction

These standards for Florida Public Libraries were developed by the Florida Library Association with support from the Florida Department of State, Division of Library and Information Services. FLA is indebted to the work of scores of librarians from all over the nation who have worked for many decades to develop public library standards and keep them current and useful.

Methodology

The FLA board appointed a Public Library Standards Committee in 2002. After issuing a request for proposals, FLA selected library consultant Ruth O'Donnell to assist in coordinating the work of the committee, gathering information, and drafting the standards document. Development of these standards was a multifaceted process, which included:

1. Discussion of standards revision at several FLA Annual Conference meetings of the Public Library Standards Interest Group.
2. Review of the current and past versions of Florida public library standards.
3. Review of the standards of other states.
4. Detailed interviews with every public library director in Florida regarding perception and use of current standards and wishes for future standards.
5. Committee work throughout the process with the consultant and the library community, and in two working subcommittees: (1) a quantitative standards subcommittee, to focus on areas in which numeric standards should be established (2) an endorsements subcommittee, to identify and approach non-library allied agencies for their reading, input, and ultimate endorsement of these standards.
6. Testing with the public library community. After overview of progress in October 2003 at he Public Library Directors Conference sponsored by the Florida Department of State, several libraries representative of all sizes and governance configurations tested the standards in daily use.
7. Revision after testing (2003-04).
8. Dissemination of the field-tested draft to public library directors for review (2004).
9. Revision in response to director comments (2004).
10. Addition of a tool kit for librarians to help them use these standards (2004).
11. Presentation at the 2004 FLA Annual Conference, Public Library Standards Interest Group for final comment.
12. Approval by the FLA Executive Board and dissemination of the final document in print and electronic formats.

Opinions of Florida Public Library Directors

As part of the research for this project, every public library director in Florida was invited to be interviewed by telephone, individually, using an interview script that ensured uniform data gathering while allowing open-ended conversation and free expression of opinions and recommendations. Most library directors responded. Key points:

- Most library directors (80 percent) reported using either the 1995 or 1985 FLA public library standards, most commonly for budget development and facilities planning.

- Usage, however, was not generally intense – typical remarks: "Yes, I take them out and look at them once in a while to get ideas." "We had to use them to complete a construction grant application." "I've adapted them to incorporate into our annual budget process." However, few libraries reported using them widely in planning, evaluation, advocacy, and staff education. "We're constantly using the items in the standards to compare ourselves to other libraries in the state and nation." "We mention in all our Friends' material that we exceed standards."

- More than half of the respondents (39) reported that their county or city manager and their governing body (38) were the most common constituencies with whom they used the standards. Also high on the list were library management staff (29), support groups (including advisory boards – 29), library staff generally (21), and the public (15).

- Most libraries use a planning model of one kind or another, typically the Public Library Association's New Planning for Results or a modification of it.

- All libraries must collect and report to the state library agency more than 70 input and output measures. Most use these data elements and the percent change in them from year to year as planning and evaluation tools.

- Most library directors thought a mix of elements would be optimum for the revised standards—quantitative measures with levels of achievement were the most frequent top priority, with activity lists and universal quantitative measures a close second. Last in priorities were checklists such as those in the current document. It is worthy of note that while several directors of smaller libraries expressed concern about setting impossible standards, there was quite general agreement that quantitative measures were important if the standards were to be useful.

- With regard to format, there was a slight preference for 8 ½" by 11" loose-leaf format in a print version; online versions were requested to be available in both Word and PDF. There was enthusiasm for a one-sheet, pamphlet or bookmark format summary sheet of core standards that could be handed out to board members, the public, staff, and others.

- When asked what topics should be added or expanded, technology was the most common subject mentioned. Library directors felt coverage of technology should be expanded, whether separated out as its own category or integrated into each of the other sections.

It is notable that there was little disagreement among library directors. While one can't quite say that they spoke with one voice, there was consensus on several points: Virtually all see the standards as potentially useful as a communications tool, especially with regard to budget advocacy and as a planning tool. Most would like to see the standards presented in a way that is concise and accessible to government officials. Most applaud the notion of clear and concise quantitative standards arranged by population and level of achievement. If the standards were endorsed by such agencies as the Florida Association of Counties, the Florida Association of Cities, and the Florida Department of State, librarians think their usefulness would be multiplied many fold.

Florida Public Library Standards – A Brief History

National standards for public library service were first published in 1933 by the American Library Association and revised public library standards were issued in 1943, 1956 and 1966. These standards were largely based on quantitative input measures. After 1966, the American Library Association (through the Public Library Association, one of its divisions)

shifted its approach from national standards to locally-based planning efforts. A series of documents from the Public Library Association has been published to help librarians plan and evaluate services that are responsive to their communities. (The most recent PLA planning model is the basis for several publications in a "Planning for Results" series.)

Although the Public Library Association doesn't publish national standards for libraries, many state library associations and state library agencies have continued to develop and publish standards for public libraries as an aid and complement to the planning and evaluation process. In addition, the U.S. Department of Education National Center for Education Statistics in partnership with state library agencies and the American Library Association has established the Federal-State Cooperative System for public library data, collecting and providing consistent, reliable data on both inputs and outputs for public libraries. These data are readily available to local libraries to use as benchmarks and evaluation tools.

This document is the fifth version of Public Library Standards for Florida. All standards were developed under the leadership of the Florida Library Association, with varying degrees of participation and support from the state library agency. A short summary follows:

1967 - Florida's First Public Library Standards

Florida Standards for Public Library Service was published in 1967 by the state library agency, then called the Florida Library and Historical Commission. The document was developed by a 15-member FLA special committee appointed by Legislative and Planning Committee chairs. This committee was organized into seven subcommittees, each of which drafted portions of the document. The preliminary draft was revised three times, then distributed to all public library administrators, friends, and board chairs. The standards were discussed in an open meeting at the FLA conference and finally formally adopted by the FLA board and by the State Library and Historical Commission. The Commission is the sole name on the title page as publisher.

Echoes of these early standards can be found in all subsequent standards, including the present ones, both in terms of topics addressed and the mix of quantitative and qualitative statements. A purpose was to serve as a "guide for the development and evaluation of public library service. While giving broad principles of service, the standards also include criteria against which local library systems can measure resources and services." Standards were arranged in broad categories: *Structure, Services and Government; Personnel*; *Books and Non-book Materials; Organization and Control of Materials; Public Relations and Publicity;* and *Physical Facilities.*

1974 – Emphasis on Services

The second set of *Florida Standards for Public Library Service* was published by FLA in 1974. The state library agency, while no longer the official "publisher," funded the publication through a Library Services and Construction Act (LSCA) grant, and the committee included at least one state library employee. The revision was undertaken at the behest of three FLA divisions: Schools, Children's Services, and Public Libraries. This document uses the same organization and much of the same language as the 1967 standards, with some revision and addition of guidelines for children's, adult, and young adult services.

1985 – Towards Professionalism; an Official Look

Standards and Guidelines for Florida Public Library Services was published in 1985, again by FLA with fiscal support through the State Library's LSCA program. These standards were developed by an eleven-member committee that included representatives from public

libraries of various sizes and governance types, a representative of the State Association of County Commissioners, a representative of the Florida League of Cities, and the State Librarian. It was edited by Alphonse F. Trezza, faculty member of the Florida State University graduate library school. This edition of the standards was a half-size, saddle-stitch bound document with an official-looking typeface, layout, and heading numbering systems. These standards continued the practice (established in the 1974 standards) of providing a short summary of all standards with particular attention to numeric measures addressing funding, collections, personnel, hours.

1993 - Community-based Standards

These standards were the most sweeping revision yet, the most significant variation on the 1967 approach. The loose-leaf, checklist format suggests an internal planning tool rather than an official publication to be distributed widely outside library circles. *Standards for Florida Public Libraries: A Vision for the 21st Century* appeared in 1995. As with the previous standards, it was developed under the leadership of an FLA committee with the help of consultants, and funded through the State Library's LSCA program. The development of these standards relied heavily on consultants Barbara Weaver and Leslie Burger along with a great deal of input from the public library community: The drafters of the document cite a "library profession shift from quantitative, input-based standards to qualitative, output-based standards to measure library performance and excellence." This tone informs the entire document, which is organized under eight major headings: (1) Governance, Leadership and Funding, (2) Personnel, (3) Access, (4), Materials and Collections, (5), Services, (6), Facilities (7) Cooperation and Resource Sharing, and (8) Community Relations.

The Florida Library Landscape in 2004

Florida's public libraries are part of an intricate network that includes several hundred libraries of all types that are joined in voluntary cooperative arrangements to share resources. In addition to approximately 70 public library administrative units, there are approximately 100 academic libraries serving Florida's 28 public community colleges, 10 public universities, and more than 50 private colleges and universities; more than 200 special libraries serve government agencies, private nonprofit, and corporate institutions. Many Florida libraries participate in one of six regional multi-type library cooperatives (MLCs), which provide support and coordination for resource-sharing, training, and technology. Most public and academic libraries and many special libraries participate in FLIN, the Florida Library Information Network, a resource-sharing network coordinated through the State Library of Florida and the MLCs.

Public libraries in Florida are operated by counties, cities, or share governance and funding responsibilities through interlocal agreements. In FY 2002, 70 public library administrative units reported statistics to the state library agency (Florida Department of State, Division of Library and Information Services). These included

- 40 single-county libraries, comprising 33 consolidated library systems and 7 cooperatives. These cooperatives include 53 municipal libraries in their membership.
- 9 multi-county library systems, including 5 consolidated and 4 cooperative
- 21 municipal libraries that were not members of a public library cooperative

Consolidated systems have a single entity at the head—most often a county commission or city council; in some cases a nonprofit board of directors or a publicly elected or appointed board. Cooperative systems may comprise several county libraries, each with its own library

administration, or several cities within a county. Each of the members of a cooperative generally has its own governance and funding mechanism in addition to that of the cooperative itself.

In terms of population, all Floridians have access to public library service. The majority of these are served by county or multi-county libraries. Over half the people of Florida (8.4 million) are served by the seven largest county systems.

Some Basic Terms and Concepts

Acronyms used in this document

ADA – Americans with Disabilities Act and its attendant regulations

ALA – American Library Association

CE – Continuing education

FLA – Florida Library Association

FLIN – Florida Library Information Network

FTE – Full-time equivalent (in Florida, generally 40 hours per week)

MLC – Multi-type library cooperative

LSTA – Library Services and Technology Act, a federal grant program

NCES – National Center for Education Statistics, U.S. Department of Education

OCLC – Online Computer Library Center, the national bibliographic utility

PLA – Public Library Association, a division of ALA

SF—Square feet

Levels of Service

Three levels of service have been established for use with some of the standards in this document:

- Essential: Essential level standards define the basics of library service. Every library can and should offer them.
- Enhanced: This level starts where Essential leaves off and offers expanded services.
- Exemplary: Achieving this standard provides the highest and best service to the community.

Population Groupings

The Committee decided to use four population groupings – libraries serving populations of:

- Up to 25,000
- 25,001 to 100,000
- 100,001 to 750,000
- 750,001 and up

Basic Services

These standards assume that public libraries are defined by five services: lending of materials, providing information on request, public programs, public space, and public access to the Internet and personal computing applications. Library planning processes typically help managers decide the varying resource allocation to each of the services, and the specific expression of those services in response to local community needs.

Determining Service Population Size

The library's service population may vary from the population of its governing body (city or county) or the agency that funds it. Many municipal libraries as well as libraries that are members of public library cooperatives serve not only the population of their city/county but also people who live in other cities/counties. They may be the only or most convenient library service available to people living in unincorporated areas of the county. An expanded and more realistic service population is used for planning in these instances. Also, libraries with large seasonal populations and those that are heavily engaged in resource sharing must consider the population served in this way as they plan. See the toolkit at the end of this document for assistance in determining a service population for planning purposes if the above situations apply to your library.

Statutory Standards

Most aspects of library operations are subject to federal and state statutes—those responsible for governing and managing libraries should be familiar with statutes related to such areas as personnel, access for people with disabilities, building codes, interlocal agreements and the like.

Chapter 257 of the *Florida Statutes* specifically addresses public libraries, establishing requirements for eligibility to participate in the State Aid to Libraries Program. These are the only standards available in law for public libraries in Florida – the only standards that can be enforced and then only if a library's governing body seeks state aid funds.

Standards for State Aid Eligibility

Section 257.17 says that political subdivisions of the state of Florida are eligible to receive state aid grants for the purposes of operating a public library if the following criteria are met:

1. The political subdivision has been designated by a county or municipality as the single library administrative unit.

2. Library services are operated under a single administrative head who is an employee of the single library administrative unit and who has completed a master's degree from a library education program accredited by the American Library Association. The single administrative head shall have at least 2 years of full-time paid professional experience, after completing the library education program, in a public library that is open to the public for a minimum of 40 hours per week.

3. The library must expend its funds centrally.

4. The library must provide reciprocal borrowing and other library services pursuant to interlocal agreement to residents of all political subdivisions in the county which receive operating grants from the state.

5. The library must have at least one facility open for a minimum of 40 hours a week.

6. The library must have a long-range plan, an annual plan of service, and an annual budget.

7. The library must engage in joint planning for coordination of library services with all libraries within the county or counties (if a multi-county cooperative) that receive state aid operating grants.

Core Standards

The standards below are part of the Comprehensive Standards list in the next section but are presented separately here to identify them as vital to providing effective public library service. They are the basics that the Association believes a public library must meet if it is to effectively carry out the public library mission.

Topic	Standard Number	Core Standard
Governance	1	The library is established and operated in accordance with relevant state and federal laws, specifically *Florida Statutes*, Section 257.17 governing public libraries and also state and federal laws that apply to public entities.
Access	24	The library provides services free of charge to everyone in its service population.
	26	Hours open: Essential — 40 hours a week at one outlet Enhanced — 68 hours, including 20 during evenings/weekends Exemplary — 76 hours, 7 days a week, 4 evenings
Public presence	37	Libraries/systems spend a minimum of 1% of the library operating budget (all expenditures except capital funds) on the entire community relations program, including marketing library services, increasing public awareness, and public relations.
	46	Library leadership—including (at a minimum) board members, friends, and senior management staff—are articulate in communicating about library services and needs. Advisory board members and friends are encouraged to formally and informally advocate for library funding and status with all elected and appointed officials who have fiscal and policy influence on the library future. This audience includes elected and appointed officials at the local, state, and federal levels.
Funding	51	Public libraries are funded primarily through local tax revenues. Where this is impossible due to local economic conditions (as indicated by local property tax valuation), supplementary state funds enable libraries to provide basic services.
Staffing	56	Full-time Equivalent staff per 1,000 of population served: Essential — .3 FTE Enhanced — .5 FTE Exemplary — .6 FTE

Topic	Standard Number	Core Standard
Continuing education	59	Hours of formal and informal continuing education and training per employee each year:

	Professional staff	*Support staff*
Essential	24	16
Enhanced	34	22
Exemplary	48	32

Topic	Standard Number	Core Standard
Currency of materials	73	Annually delete at least 5% of the total number of items available at the start of the fiscal year and add each year a percentage to achieve desired levels in standard No. 77.
Number of materials	77	Number of items in all formats in the collection:

Quality Level	*Number of items in all formats, per capita*			
	Up to 25,000 population	25,001 to 100,000 population	100,001 to 750,000 population	750,001 and up population
Essential	10,000 minimum, 3 per capita preferred	2	2	2
Enhanced	4	3.5	3	2.5
Exemplary	5	4.5	4	3

Topic	Standard Number	Core Standard
Type of materials	79	The library provides access to materials available on the Internet and the databases available through the Florida Electronic Library.
	80	The library provides materials in a variety of formats and includes new formats as they become of interest to the service population.
Facility size	90	Square footage per capita:

Quality Level	*Total gross square feet per capita*			
	Up to 25,000 population	*25,001 to 100,000 population*	*100,001 to 750,000 population*	*>750,001 population*
Essential	.6 SF with .8 desired	.6 SF	.6 SF	.6 SF
Enhanced	.9 SF	.8 SF	.7 SF	.65 SF
Exemplary	1.0 SF	1.0 SF	1.0 SF	.85 SF

Topic	Standard Number	Core Standard
Services	112	The library provides at a minimum those services that are considered basic to the mission of all public libraries, that is, lending, information, programs, public space, and Internet access and personal computing applications services.

Comprehensive Standards

Leadership, Planning, and Evaluation

Note: Most Florida public libraries do not have governing boards apart from the governing bodies of the governmental jurisdictions that establish and fund them. Most are governed by boards of county commissioners or city councils; a few are governed by independent public library governing boards or private nonprofit corporate boards. Libraries that are members of cooperatives have dual governance – through their establishing jurisdiction, and the cooperative governing board itself. In many cases, advisory boards are appointed to assist governing bodies with the work of library governance. Standards for good governance apply regardless of the specific governing configuration of a particular library.

Legal

1. **Core Standard: The library is established and operated in accordance with relevant state and federal laws, specifically *Florida Statutes, S*ection 257.17 governing public libraries and also state and federal laws that apply to public entities.**

2. The library governing board selects and annually evaluates the library director or delegates these responsibilities.

3. *Statutory standard*: The library must be operated under a single administrative head who is an employee of the single library administrative unit and who has completed a master's level library education program accredited by the American Library Association. The single administrative head shall have at least 2 years of full-time paid professional experience, after completing the library education program, in a public library that is open to the public for a minimum of 40 hours per week [*Florida Statutes* 257.17 (2)(a)].

4. The library does not discriminate in hiring or provision of services.

Boards

5. The Library adopts policies related to its programs and services. The library governing body adopts or is knowledgeable about these policies. (Specific policies appear under appropriate headings in this standards document.)

6. Where there is not a library-specific governing board (defined for this document as a board separate from the board of county commissioners or city council/commission), a library advisory board is in place to advise the governing entity with regard to all governance issues, including matters pertaining to policy, legal and fiscal issues, and the hiring of a qualified library director.

7. The library advisory board or library-specific governing board meets at least quarterly and complies with open meetings and open records provisions of the Florida Government in the Sunshine Law (*Florida Statutes Chapter 286).*

8. The Library governing and/or advisory board is well informed about the programs, policies, budget and plans of the library through regular and frequent formal and informal communications from the library director.

9. Library governing and/or advisory board members attend at least one conference or training program per year specifically related to board development, roles, and responsibilities.

10. The governing and/or advisory board engages in formal annual planning for board development that includes a self-evaluation exercise and planning of ongoing identification, cultivation, and recruitment of effective board members.

Planning and Evaluation

11. *Statutory Standard*: The library has a long-range plan, an annual plan of service, and an annual budget [*Florida Statutes* 257.17(2) (e)].

12. *Statutory Standard*: The library engages in joint planning for coordinating of library services within the county or counties that receive operating grants from the state [*Florida Statutes* 257.17 (2) (f)].

13. The library undertakes a comprehensive and detailed long-range planning process at least every five years or uses a continuous planning model whereby the plan is updated annually. The plan addresses services and resources of the library. The planning process includes systematic community input. The library uses library planning models such as the Public Library Association "Planning for Results" series, county or city-mandated planning models, or other available models.

14. The long-range plan serves as an evaluation tool – its provisions are monitored regularly and the library director regularly reports on progress toward objectives and goals to the library advisory and/or governing board.

15. The library regularly collects data on input (resources available), output (use statistics), and outcomes (impact on individuals and the service area). At a minimum, it collects those data elements required by the state library agency in its annual statistical report; in addition, the library collects and analyzes data appropriate to evaluate impact and progress toward stated goals and objectives.

16. The library reports the result of evaluations of the impact of its services to its governing body and to the public.

Library Director and Management

17. The library director manages all operations of the library, including budget, personnel, planning, and evaluation.

18. The library director keeps staff well informed so they are articulate spokespeople for library programs and resources.

19. The library director participates in community organizations.

The Library in the Professional Community

20. The library is an institutional member of a professional association.

21. The library encourages Friends of the Library groups to become institutional members of the Friends and Trustees groups in professional organizations.

22. Board members and library staff continually develop their understanding and expertise through membership and participation in the activities of professional associations.

Access

Policy

23. The library has written policies covering all the following:

    - Use of facilities and display areas
    - Rights and responsibilities of customers (customer behavior)
    - Children's use of the library
    - Access to the Internet and personal computing applications
    - Access to facilities and materials by persons with disabilities

24. **Core Standard: The library provides basic services free of charge to everyone in its service population.** (The five basic services are defined as lending of materials, providing information on request, public programs, public space, and public access to the Internet and personal computing applications. This standard does not prohibit the provision of some services on a cost recovery basis.)

25. Library customers are able to use materials and services regardless of age taking into account community standards and state and federal laws.

Hours of service

26. **Core Standard: The library is open to the public at fixed times and with a uniform schedule. The library provides minimum unduplicated service hours as follows:**

Quality Level	Minimum Unduplicated Hours
Essential	**40 hours (from FL law)**
Enhanced	**68 hours** **20 of these must be evenings and weekends**
Exemplary	**76 hours** **7 days a week; 4 evenings**

27. When the library is open, all basic services are available, i.e., lending of materials, information, public programs, public space, and public access to the Internet and personal computing applications.

28. When the library is not open, a recorded telephone message provides information on hours of service. The library's web site provides information on hours of service, location addresses, e-mail contact, and telephone numbers including area code.

Library Card Registration

29. The percent of the service area population that is registered for a library card in the library's database (purged annually of registrants who have not used their card in the last three years) is:

Quality Level	Percent of Population
Essential	30%
Enhanced	50%
Exemplary	75%

Accessibility

30. The library facility is physically accessible to all people and meets the requirements of the *Americans with Disabilities Act Accessibility Guidelines for Buildings and Facilities* as published in the *Federal Register*, the Florida Building Code, and any applicable local standards.

31. The library provides users with disabilities who are unable to travel to the library with service in keeping with the provisions of the Americans with Disabilities Act.

32. The library has telephone service at all outlets with an adequate number of phone lines; library phone numbers are cross-listed in the local telephone directory. Live contact should be readily available by telephone.

33. The library's web site and automated catalog are available through the Internet and meet current guidelines for access by people with disabilities (a commonly-accepted set of guidelines provided by the World Wide Web Consortium's Web Access Initiative is available at http://www.w3.org/TR/WAI-WEBCONTENT).

34. The library delivers materials to customers' preferred library locations.

35. The library works with community transportation providers to encourage availability of public transportation to the library.

36. Community relations and public presence program are part of the library's official long-range plan.

37. **Core Standard: Libraries/systems spend a minimum of 1% of the library operating budget on the entire community relations program, including staff time, surveys and research, marketing, public awareness, and public relations. Note: this does not include any capital expenditures, but does include all staff time involved in giving presentations to groups in or outside the library.**

38. One staff member has responsibility for coordinating community relations programs, plans, and activity. In smaller libraries this person might have other job responsibilities, in large libraries this person might be a department head with several people under him/her.

39. Staff responsible for this area has access to continuing education and information about theory and practice and current developments in public/ community relations and marketing.

40. The library provides an annual report to the public whether the report is its own or part of the larger governing body report.

Community and market research

41. The library assesses community perceptions of its services through one or a combination of accepted opinion/market research techniques such as formal surveys, focus groups, town meetings, exit interviews, and the like. The library will listen in this way to everyone in the community whether they are current library users or not. The library establishes a schedule for this assessment.

Internal communications

42. The library supports excellent service through regular communication between leadership and staff through meetings, email, intranet, and other appropriate methods.

Variety of methods to inform community of programs, resources, and services

43. The library systematically informs its community about programs and resources through a combination of communications techniques, including media/press releases; flyers, posters, pamphlets; television and radio; special events.

44. The library maintains a complete, easy-to-use, and up-to-date web site giving access to its services and information about them.

Community relations, advocacy, and public presence

45. The library encourages an active Friends of the Library group. One staff member is appointed official friends' liaison to ensure friends have all the information they need to effectively carry out a program of support of the library.

46. **Core Standard: Library leadership—including (at a minimum) board members, friends, and senior management staff—are articulate in communicating about library services and needs. Advisory board members and friends are encouraged**

to formally and informally advocate for library funding and status with all elected and appointed officials who have fiscal and policy influence on the library future. This audience includes elected and appointed officials at the local, state, and federal levels.

47. Library director and staff communicate with library governing and/or advisory board members and friends leaders to equip them with current information about the library so they may be articulate and well-informed spokespeople in informal and formal settings with individuals and community groups.

48. The library pursues partnerships in programs and information with allied educational, cultural, and community organizations.

49. Library staff is encouraged to participate in other community organizations (serving on boards, members, volunteering and the like). Such participation is formally recognized by administration and work release time is given when possible.

50. The library acknowledges and respects cultural diversity in the community it serves.

Resources – Funding

51. **Core Standard: Public libraries are funded primarily through local tax revenues. Where this is impossible due to local economic conditions (as indicated by local property tax valuation), supplementary state funds enable libraries to provide basic services.**

52. Governing bodies establish local funding based on local revenues and well-considered budget requests.

April 2013 Update: The following benchmarks can be used to help define reasonable funding levels. This information updates *Standards for Florida Public Libraries 2004, 2006 Revision.*

Florida Library Income by Source Fiscal Year (FY) 2010-2011

Source	Total	Average percent of total budget
Local public funds	$474,597,959	91.33%
State funds	$21,869,375	4.21%
Federal funds	$2,502,007	0.48%
Other funds (private)	$20,709,391	3.99%
Total	$519,678,732	

Florida Library Expenditures FY 2010-2011

Total Operating Expenditures per capita	$27.87
Total Operating Expenditures	$532,029,566
Staff – percent expenditure	68.11%
Collection – percent expenditure	11.21%
Other – percent expenditure	20.68%

Source: Division of Library and Information Services,
http://info.florida.gov/bld/Research_Office/BLD_Research_index.html

National Library Income by Source FY 2009-2010

Source	Average percent of total budget
Local public funds	84.2%
State funds	7.5%
Federal funds	0.4%
Other funds (private)	7.9%

National Library Expenditures FY 2009-2010

Total Operating Expenditures per capita	$36.84
Staff - percent expenditure	66.6%
Collection – percent expenditure	12.0%
Electronic access – percent expenditure (part of Collection)	12.0%
Other – percent expenditure	21.4%

Source: Institute of Museum and Library Services,
http://harvester.census.gov/imls/pubs/pls/index.asp

53. Funding from private sources (such as foundation or corporate grants, individual contributions raised by Friends, and bequests) helps support and enhance library services.

Resources - Staff, Continuing Education, and Volunteers

Policies

54. The library has written policies covering personnel including such topics as job descriptions, salary and classification schedule, performance review, equal employment opportunity, diversity, and other topics related to effective personnel management and that are correlated with policies of the governing body.

Professionally educated staff members

55. The number of library employees who have graduated from a library education program (master's degree) accredited by the American Library Association is:

Quality Level	Number of Professionally Educated Staff
Essential	Minimum of one per administrative unit (257.17 *Florida Statutes*)
Enhanced	Minimum of one at each location providing basic services but size of facility and services provided are considered in order to establish appropriate professional staffing
Exemplary	One third of full-time equivalents (FTEs*) in the library/system

* One FTE equals 40 hours of work time per week.

Staffing

56. **Core Standard: The library has the following number of FTEs per 1,000 of population**:

Quality Level	FTEs per 1,000 population
Essential	.3
Enhanced	.5
Exemplary	.6

Compensation

57. Staff compensation is regionally competitive and comparable to that of other staff within the purview of the library's governing body that has the same level of authority and responsibility. Where the library is independently governed, common-sense comparisons with local public sector positions are used to set compensation levels.

Continuing education and training

58. The library has a written staff development plan or policy that addresses new employee orientation, ongoing training, and continuing education and is based on periodic needs assessment.

59. **Core Standard: All library employees have the information and skills they need to do their jobs well; they participate each year in the number of hours of continuing education and/or staff training below. Higher education course work should not be included in this count. Library staff development programs take into consideration accreditation guidelines as they are promulgated by the American Library Association or other appropriate accrediting bodies.**

Note: The following hours include formal and informal learning such as on-the-job training, information given at staff meetings, workshops, and the like.

Quality Level	Hours of CE and/or Training	
	Professionally educated staff	Support staff
Essential	24	16
Enhanced	34	22
Exemplary	48	32

60. Library staff participates in library professional associations at the level below:

Quality Level	Professional Association Membership
Essential	Minimum of one person who is a member of an association
Enhanced	15% of FTEs are members of at least one professional association
Exemplary	30% of FTEs are members of at least one professional association

61. The library's staff members are computer literate, able to use electronic mail, and trained to use and assist the public in using available electronic materials and sources.

62. The library's staff members are trained in customer service.

Volunteers

63. The library has a policy describing how it uses volunteers.

64. The library may use volunteers to enhance paid staffing.

65. Library volunteers are oriented to library mission, policies, and procedures before they begin work and are assigned tasks appropriate to their skill level.

66. The library has a process for training and assessing volunteers; volunteers are not assigned to tasks for which they have not received training.

Resources – Materials

Policy, planning, and evaluation

67. The library has a written collection development plan that has been reviewed and revised as needed within the past five years and approved by its governing body or that body's advisory board.

68. The library's collection development plan includes a selection policy reviewed and revised if needed within the last five years. The plan and policy consider community demographics and needs.

69. The collection development plan endorses:

    - The Library Bill of Rights of the American Library Association and its interpretations.
    - Freedom to Read, a joint statement by the American Library Association and the Association of American Publishers.
    - Freedom to View, a statement of the American Film and Video Association.

    (Note: These documents and additional resource material are available in the American Library Association *Intellectual Freedom Manual* 6th edition.)

70. The collection development plan includes a procedure for handling complaints, questions, and comments about materials and a procedure for quick response to such concerns.

71. The library has a materials preservation policy that reflects the mission of the library.

72. The library periodically evaluates its collection to determine strengths and weaknesses and acts on that information to make improvements.

Materials currency

73. **Core Standard: The library maintains a current collection of materials by:**

    - **Deleting, each year, at least 5% of the total number of items available (as counted at the start of the fiscal year).**
    - **Adding each year a percentage to achieve desired levels in Standard 77.**

74. The library has a process to continually minimize the amount of time between purchase and availability of new materials.

Materials diversity

75. Library materials reflect the diversity of the community served by the library.

76. The library makes every effort to ensure that it includes materials that its customers need and want, even though other customers may find those materials objectionable.

Amount and type of materials

77. **Core Standard: The number of items (volumes) *in all formats* in the library's collection is:**

Quality Level	Number of items in all formats, per capita			
	Up to 25,000 population	25,001 to 100,000 population	100,001 to 750,000 population	750,001 and up population
Essential	10,000 minimum, 3 per capita preferred	2	2	2
Enhanced	4	3.5	3	2.5
Exemplary	5	4.5	4	3

78. **Core Standard: The library provides access to materials via the Internet and the Florida Electronic Library.**

79. **Core Standard: The library provides materials in a variety of formats and includes new formats as they become of interest to the service population.**

80. The library provides materials that can be used by persons with disabilities in accordance with requirements of ADA regulations.

81. The library provides access to information about the materials available in other libraries.

Resources – Facilities

Planning

82. The library has a current disaster response and recovery procedure in place.

83. Planning for library facilities development is based on at least twenty year population growth projections and other factors including location of possible future library buildings and plans for major new residential and commercial development.

84. Long-term facilities needs and immediate construction and renovation project planning include community input.

Location

85. The library periodically reviews population growth in its service area and assesses the need for new facilities.

86. Library facilities are located:

   - in urban areas, no more than 20 minutes driving time from residents as an average of multiple travel time studies from a) the edges of the service are to the nearest available library and b) between available libraries.
   - in rural areas, no more than 30 minutes driving time from residents.
   - where possible on a fixed transportation route.

   Notes: Driving time standards are not applicable during peak traffic seasons. Urban is defined as an incorporated place and adjacent densely settled surrounding area that together have a minimum population of 50,000. Rural is an area that does not meet the definition of urban area.

Signage

87. Library facilities have exterior signs so the library is clearly identifiable from the street.

88. There is directional signage to the library on nearby streets.

89. The library provides professionally produced interior signage adequate to help patrons make good use of the facility.

Facility Size

90. **Core Standard: Standards in the chart below are for use in assessing library space needs when planning new construction and expansion of existing library facilities. The facility will meet the following square-footage standards, depending on service level.**

Quality Level	Total gross square feet per capita			
	Up to 25,000 population	**25,001 to 100,000 population**	**100,001 to 750,000 population**	**750,001 and up population**
Essential	.6 SF with .8 SF desired (.6 SF is state construction grant standard)	.6 SF	.6 SF	.6 SF
Enhanced	.9 SF	.8 SF	.7 SF	.65 SF
Exemplary	1.0 SF	1.0 SF	1.0 SF	.85 SF

Parking

91. The library provides parking availability as follows:

Parking	Essential	Enhanced	Exemplary
The number of parking spaces:	Meets local codes or one space per 200 square feet of gross building area, whichever provides more spaces	Meets Essential plus has additional parking to accommodate use of meeting rooms, computer labs, programming, and employee parking needs	Meets Enhanced plus has dedicated employee parking near the employee entrance (1 space per .75 FTE)
The number of ADA compliant parking spaces is:	Per Florida building code	Per Florida building code	Per Florida building code; additional spaces when service population includes a large seniors/elders group
The size of non-ADA compliant parking spaces is:	162 SF (9' wide)	180 SF (10' wide)	190 SF (10+ ' wide)

Space Allocation

92. Space is allocated for various uses as follows:

	Essential	Enhanced	Exemplary
Staff offices and workstations			
Staff offices are:	According to governing body standards or 100 to 125 SF	126 to 150 SF	151 to 175 SF
Staff workstations are:	According to governing body standards or 60 to 70 SF	71 to 80 SF	81 to 90 SF
Service desks, per computer	100 SF	125 SF	150 SF
Public Seating			
Public seats per 1,000 of population served are:	Less than 25,000 population = 4	Less than 25,000 population = 6	Less than 25,000 population = 8

	Essential	*Enhanced*	*Exemplary*
	More than 25,000 population = 1 to 4 (Larger population: fewer seats)	More than 25,000 population = 2 to 5 (Larger population: fewer seats)	More than 25,000 population = 3 to 6 (Larger population: fewer seats)
Lounge seating/informal meeting, per seat is:	40 SF	Same	Same
Table seating – adult and teen, per seat is:	30 SF	Same	Same
Table seating – young children, per seat is:	20 SF	Same	Same
Carrels/micromaterials, per seat are:	30 SF	Same	Same
Storytime area space, per seated child is:	10 SF	Same	Same
Public Use Computer Workstations			
Computer workstations for public use are:	30 SF	35 SF	40 SF
Materials Shelving			
Print and non-print items, average number per square foot of floor space is: (see Planning Guidelines for Shelving Capacities in Toolkit)	15	12	10
Periodicals (display shelving), average number per square foot of floor space is:	1.5	Same	Same
Periodical display shelving height (ADA – ABA requirement[1]) is:	Maximum reach of: Aged 12 and over – 48"; children – Age 3-4 – 36" Age 5-8 – 40" Age 9-11 – 44"	Same	Same
Periodical storage (back issues in public area),	3	Same	Same

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[1] *ADA-ABA Guidelines* available at ADAbuild.com/usabdocs/ada-aba-guidelines.htm and *US Federal Register* July 2004

	Essential	Enhanced	Exemplary
one year of one title, average number of titles per square foot of floor space is:			
Meeting space			
Adult seating in meeting rooms theatre style seat is:	10 SF	12 SF	15 SF
Speaker/performance space per meeting room is:	100 SF	150 SF`	200 SF
Per seat square footage in conference rooms is:	25 SF	30 SF	35 SF
Special use space			
Space for furnishings not listed above is allocated based on the number and type of such furnishings.			
Nonassignable space			
Space for nonassignable needs (communications rooms, stairwells, elevators, janitor closets, hallways, etc.) varies depending on building design but averages 20 to 35% of gross building space.			

Lighting

93. Light levels are:

   a. 50 to 70 sustained foot-candles at table-top height in public service area

   b. 30 to 50 foot-candles at table-top height in storage areas

   c. 35 foot-candles at floor level with particular attention paid to stack aisles to assure adequate lighting on all shelves

   d. Lighting is evenly distributed and of such quality to provide adequate light without glare; areas housing computers are free of glare

Telecommunications

94. Telecommunications cabling follows the National Electrical Code (NEC) and Building Industry consulting Services International (BiCSi) Telecommunication Association guidelines.

95. Telecommunication rooms (closets) are:

   Area Served   Closet Size

5,000SF	10ft x 7 ft
5,000SF – 8,000SF	10ft x 9ft
8,000SF plus	10ft x 11ft per floor

Electrical

96. Electrical wiring meets National Electrical Code (NEC) minimum requirements.

97. Electrical power outlets are based on furniture plans and allow for future flexibility.

98. Sufficient power is available to all locations in the library to accommodate laptop computers and anticipates future needs.

Humidity control

99. Heating, ventilating, and air conditioning systems maintain relative humidity levels of 50 to 60% year round. Special collections meet stricter standards established to preserve the materials collected.

Resources - Technology

100. Policy: The library has a technology policy and plan in place; the policy is adopted by the governing and/or advisory board.

101. Availability of public access Internet-connected computer workstations.

	Essential	*Enhanced*	*Exemplary*
Number of operating computer workstations	Minimum of 1 public workstation per 3,000 population	1 public workstation per 2,000 population	1 public workstation per 1,000 population

102. The down time for any single public access computer workstation/printer does not exceed 48 hours.

Staff

103. Scheduling and training of staff takes into consideration the demands of public computer use with regard to scheduling and trouble-shooting computer hardware or software. Sufficient staff is available to provide support in these areas.

104. The library has staff dedicated to system and connectivity planning and operations, even when the governing jurisdiction has such staff in its own offices.

105. Library staff members participate in continuing education programs and self-education regarding emerging technologies and new library applications of existing ones.

Currency

106. New technologies are incorporated into library programs and services as appropriate in anticipation of public demand.

107. Hardware and connectivity are up to date and support speedy and easy access to online and off-line electronic information resources.

108. Facilities planners will take into consideration new technologies for connectivity and telecommunications when planning new or remodeled facilities.

Interconnectivity

109. Telecommunications and computer technology is chosen to facilitate resource sharing and is compatible with Florida, regional and national library networks such as FLIN and OCLC.

110. The library has an automated library system that meets current and appropriate technical standards for library records, in order to facilitate the sharing of resources.

111. The library provides access to information on the holdings of other libraries.

112. **Core Standard: The library provides at a minimum those services that are considered basic to the mission of all public libraries, that is, lending, information, programs, public space, and Internet access and personal computing applications services.**

Service policies

113. The library has policies defining the scope of its services and setting service priorities.

114. The library has a policy emphasizing welcoming and effective service for all segments of the community, including delivery of accurate information, and expeditious, courteous service.

115. The library's policies regarding use of its resources and loan of its materials easily facilitate use by customers.

116. The library's fine and fee policies promote use by people of all income levels.

117. The library has a policy regarding confidentiality of customer records that adheres to Florida law and official Florida Library Association positions on this matter.

118. Where large populations speaking languages other than English are part of the user group, the library has staff that can help non-English speakers, signage, and publications designed to help non-English speakers use the library.

Prompt and Courteous Service

119. The library surveys customers periodically regarding the helpfulness and general attitude of staff members.

120. All requests for information are answered or a referral initiated within 24 hours of the request. Regular status reports are provided if the request takes longer than 48 hours.

121. The library's public access computer workstations are available with an average wait of no more than:

Quality Level	Average Wait Time
Essential	30 minutes
Enhanced	20 minutes
Exemplary	10 minutes

122. Returned materials are shelved within twenty-four hours of return (except for closed days) to assure ongoing access by customers.

123. The library provides timely notification to customers of the availability of reserved or inter/intra-library loaned items.

Lending Services

124. The library has an automated system for customer and materials records that is integrated with the library's automated catalog and provides accurate, reliable information.

125. The library's customer registration records are accurate and up-to-date.

126. Loan periods are based on collection size, demand, and turnover rate; as many formats as possible have the same loan period.

127. Library customers can reserve and renew items online as well as in person and by telephone

128. The library does not place age restrictions on the circulation of materials except where local policies permit individual parental requests.

Information Services

129. The library has policies / guidelines covering the provision of information services. These policies and guidelines are a reflection of chosen service responses, roles, or other elements of the library's long-range plan.

130. The library provides in-person information services by qualified staff during all open hours. Information services include at a minimum reference, readers advisory, and assistance with access to electronic information.

131. Information provided to users in response to their queries is accurate and is derived from sources that meet professional standards of authority and recency.

132. The library provides remote information services through email, online "chat," or telephone as appropriate and as called for in the community-based long-range plan.

133. Internet access complies with state, local, and federal law.

Services – Programming and Lifelong Learning

134. The library provides educational, cultural, and recreational programs by qualified staff and/or other qualified experts.

Quality Level	*Program attendance per capita			
	Up to 25,000 population	25,001 to 100,000 population	100,001 to 750,000 population	750,001 and up population
Essential	.25	.20	.15	.15
Enhanced	.30	.25	.20	.20
Exemplary	Enhanced level plus no waiting list (use your library's policies regarding program group size)			

*Programs sponsored by the library.

135. The library provides programs that are in concert with its long-range plan. The programs provided by the library might include but not be limited to preschool story time, teen book clubs, lectures, and classes.

136. The library plans programs where appropriate in partnership with other educational and community organizations, including schools, home schoolers, adult and children's literacy groups, and service clubs.

137. Library programs are equally open to all and offered at times of day and days of the week that meet community needs.

138. The library program location is accessible to people with disabilities and the library provides adaptive equipment as needed.

Services for Targeted Populations

Policies

139. The library has written policies regarding the type and level of services available to the segments of its service area population that it targets for special attention.

Young Children and Teens

140. The library provides a separate room or area of its facilities for infants, preschool and elementary school aged children which includes materials, computers, adult and child seating, and performance space.

141. The library has a staff member with a master's degree from an accredited American Library Association program who is responsible for planning and delivering children's services.

142. The children's collection and services are coordinated with schools and other agencies serving children in the library's service area.

143. Some of the programs for children are provided in the evening and on weekends.

144. The library provides separate space for teenagers to gather and study that has materials, computers, and seating.

145. Teen-aged customers participate in the library's planning of services targeted to their age group.

Elders

146. The library's collection includes an adequate number of materials in formats that allow elders to continue to enjoy books and reading.

147. The library makes individuals who can benefit from the national Talking Book Service aware of it and assists them in getting service.

148. Adaptive devices for enlarging print and enhancing sound are available in the library for use by customers.

149. The library cooperates and forms service partnerships with local agencies providing services to elders.

150. Library staff members assigned to programs and services intended for elders have training about the needs of elders that enables them to successfully provide such services.

151. Elders are involved in planning services for their age group.

People with Literacy Needs and Non or New English Speakers

152. The library provides literacy and English language related services at a level appropriate to its mission and goals, and at a minimum, allows one-to-one tutoring in its public spaces.

153. The library has a formal relationship with adult and children's literacy and English-as-a-Second-Language providers in the service area.

People who Have Difficulty Using or Getting to Library Services

154. The library evaluates the need for outreach services in its service area annually.

155. Outreach services are provided to individuals and groups that cannot get to library facilities, such as homebound, incarcerated, or institutionalized people.

156. The library adapts its services to meet the needs of people with disabilities as required by the Americans with Disabilities Act.

Services - Resource Sharing and Interlibrary Cooperation

157. *Statutory standard:* The library must provide reciprocal borrowing and other library services pursuant to interlocal agreement to residents of all political subdivisions in the county which receive operating grants from the state [*Florida Statutes* 257.17 (2)(c)].

158. The library participates in statewide and national resource sharing agreements.

159. Library staff is involved in regional/statewide efforts in development and enhancement of resource sharing and interlibrary cooperation

Appendix: Toolkit for Librarians

Using Florida Public Library Standards 2004

These public library standards can be an effective tool for carrying the library message to your various constituencies. They can be helpful in planning and evaluation, in helping governing bodies set goals, and in providing you with new ideas. Here are a few examples of ways to use them.

Internal

- Use the standards as a basis for evaluating your current program and services. Use a staff committee to go through them one by one and see where your library stands.
- Discuss one or more standards or sections of the document for a short time at each staff meeting.
- Put standards on the agenda at board meeting; explain where the library meets standards; where it falls short; what targets it might want to aim for.
- Incorporate specific standards into your long-range plan.
- Include information about standards in newsletters and flyers.
- Include information about standards in presentations to your Friends of the Library.

Stakeholders

- Publicize standards with your city or county commission or other governing body. Show where your library meets them, where you could aim for a higher level.
- Use key standards in letters and emails to state legislators; keep them informed where you stand.
- Let your library patrons know where you stand in terms of standards. Invite them to them share your pride in success and share in efforts to strengthen services.
- Put a note about one or two standards on the library's web site. Change these monthly or every now and then.

The media and general public

- Craft press releases and announcements around library standards. "XYZ Library attains "Exemplary" level of service in YY areas." "New building program enables library to meet state standards."
- Visit the editorial board of the local newspaper with standards in hand, ready to talk about why a library that meets standards is good for your common community.

Library Data Collection and Use

Library data – numerical information on resources and services (inputs and outputs)—is one of the most important tools librarians have for planning and evaluation. With it we can answer the two most important management questions: "How are we doing?" and "Where do we go from here?"

Many of these standards are quantitative and these rely on readily-available data. Beyond the standards, numerical data is important in most long-range plans, and comparisons to state and national benchmarks are key to good assessment.

Librarians are fortunate to have a great deal of comparative national and statewide data available to them at the click of a mouse. Some of the most important sources:

National Center for Education Statistics

http://nces.ed.gov/surveys/libraries/compare/

The National Center for Education Statistics is an arm of the U.S. Department of Education. It joined in 1988 with the American Library Association, COSLA (Chief Officers of State Library Agencies), and the NCLIS (National Commission on Libraries and Information Science to form the FSCS, or Federal-State Cooperative System for collection of library data.

This site is easy to use, providing step-by-step instructions in choosing peer groups and selecting data elements. It provides several different output formats—bar charts, complete data tables, and rankings, for example.

The following example is a direct screen capture of a comparison of Florida's Citrus County Public Library with other county libraries in the Southeast. Two data elements are shown – income funding per capita and visits per capita.
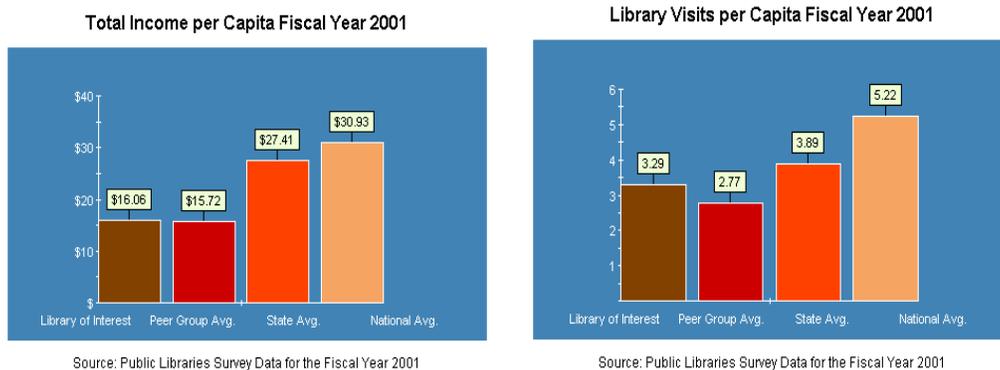
Example of NCES Bar Graph Data Report

"Library of Interest" in this case is Florida's Citrus County Public Library
"Peer Group" was defined as all County-governed libraries in the Southeast

Florida Department of State, State Library and Archives, Office of Community Development

http://dlis.dos.state.fl.us/Librarians/

The Florida state library agency collects data annually from public libraries and reports it to the NCES. In addition, it provides full statistical tables and rankings information on its web site. This information is often more current than that at the federal web site. In addition, State Library consultants can help individual libraries with finding and presenting specific data elements most appropriate for a given purpose.

Library Research Service

http://www.lrs.org/public.asp

This service is based in the Colorado state library agency, but it has a variety of links and "Fast Facts" on all types of libraries and national data. It includes a good community analysis template at http://www.lrs.org/asp_public/ca_form.asp is easily tailored to Florida use (see the "Planning" section of this toolkit).

Hennen's American Public Library Rating Index

http://haplr-index.com/index.html

Thomas Hennen's American Public Library Rating Index weights 15 measures and rolls them up into an index and then provides ratings of public libraries nationwide. Hennen uses NCES data (see above) on traditional resources and services. He does not factor in audio, video, or electronic materials and services. This index has received a good deal of attention in both library and general press since its inception in 1999. Measures are as follows, with weighting:

- Expenditures per capita 3
- Percent Budget to materials 2
- Materials Expenditures per capita 2
- FTE staff per 1,000 population served 2
- Periodicals per 1000 residents 1
- Volumes per Capita 1
- Cost per circulation (low to high) 3
- Visits per capita 3 Collection turnover 2
- Circulation per FTE Staff Hour 2
- Circulation per Capita 2
- Reference per capita 2
- Circulation per hour 2
- Visits per hour 1
- Circulation per visit 1

Public Library Association/Public Library Data Service

http://www.ala.org/ala/pla/plapubs/pldsstatreport/pldsstatistical.htm

The Public Library Data Service of the Public Library Association (a division of ALA) annually publishes a statistical report on a representative sample of public libraries. This report is generally a year more current than data available from NCES. In addition to the published report, the PLDS provides tailored data analyses to individual libraries for a small fee.

Tips for using library data effectively

- Data can be a very powerful way to show high use (for example, visits, circulation, reference questions); high need (data on funding, collections, and facilities compared to state and national averages), or high achievement (growth over several years).

- Don't overwhelm people with statistics—pick one to three data elements that carry your message well, and use them consistently.

- Many people respond well to one or two key statistics—you'll see the "Aha!" expression on audience faces when you supplement a story of service with one or two numbers. Mention two statistics along with one good story in every speech or presentation. (XYZ library welcomes more than x,000 people a day in person, and another xx,000 by cybervisit). (XYZ library lends more items than state average; spends less money than most.)

- Put interesting data elements on a bookmark, flyer, or your web site. (For example, "Last month, we checked out more than xxx,xxx books, videos, and audio materials." Or "

- Prepare several years of data on use or funding to show growth (or lack).

- Use key data elements in your presentations to advisory board, city or county commission. Relate these to data collected by other government agencies.

- Relate data elements to non-library information. (Example: More people used the XYZ library last year than watched the super bowl on TV; there are more libraries than McDonalds' in America, XYZ library is the most-used county service.)

- Use data internally with your staff. It will reinforce their impression that they're working very hard and providing lots of service. It will also help them plan and assess daily activities.

- Let your governing and advisory boards and Friends of the Library know about your statistics. Help them use data in their own presentations. Add a statistic or two to your message in their newsletter.

- Keep especially good track of the data elements that are included in the core standards in this document: Staff per 1,000 population, continuing education time, hours open, collection size, square footage of facilities.

Demographic Information Resources

This section of the Tool Kit describes some resources for demographic information about a library's service population. Demographics – population size, sex, race, language spoken, education, housing, economic condition and other data – are important for planning services and facilities. Population size is an important demographic for using the FLA Public Library Standards.

Where to Find Demographic Data

Information about the people in a geographic area is available at the local, state, and national level. Much of it is based on U.S. Census data with estimates of change in the future determined by planning experts. Some resources are:

1. **Local**

   - *Municipal and county governments.* Many have planning departments that use census and other data to establish population estimates as far out as 20 or 30 years as well as track other demographic information. Planners are aware of pending and proposed residential and commercial development that will impact growth. The many counties and municipalities that govern public libraries in Florida may prefer use of their own data for library planning, especially if there is a significant difference between it and data available from other sources. Some of this information may be online.

   - *Chambers of Commerce.* An array of demographic information is usually available in a brochure or packet provided to people and businesses considering locating in the area. Treat these data with caution as they may differ from data accepted by local governments or may be dated. Chamber information on community and area employers and resources is very valuable, however.

   - *Metropolitan or regional planning organizations* (MPO). These may be part of local government or they may be separate entities. City and county government will be aware of such organizations in your area and can refer you to them. They usually have a great deal of demographic information available and are often willing to produce maps, tables, etc. for library planning purposes.

   - *Economic development agencies*. Some counties and cities have branches of government or non-profit agencies that work on economic development. They offer demographic information in an easy to use format, often comparing the area they cover to other areas of the state or nation.

   - Your library should have a copy of the most recent *Florida Statistical Abstracts*, produced by the Bureau of Economic and Business Research (see below), an annual print publication with population projections and other demographics.

2. **State**

   - *Bureau of Economic and Business Research (BEBR),* University of Florida, www.bebr.ufl.edu. BEBR produces Florida's official state and local population estimates and projections, researches other demographics, and publishes the *Florida Statistical Abstract*. Data is not available online. Updated population estimates for Florida's larger cities and all counties are available each year.

- *Florida Department of Transportation (FDOT)* provides tables of selected Census 2000 data to every Metropolitan Planning Organization (MPO). While not all counties are in an MPO, this is a good tool for using census block data if yours is (census blocks make up census tracts and are relatively small areas of geography). FDOT also coordinates with MPOs to develop Transportation Analysis Zone (TAZ) data, where geographic breakdown is also small. These data are available from local/regional planning organizations, MPOs, and FDOT. TAZ data include estimates of growth. The geography of a TAZ is sometimes different than that of a census block. TAZs may provide statistics for a smaller area of land and so better meet needs for branch level planning and for determining the likely service population for member libraries that are part of a single-county public library cooperative. Users of TAZ data should be aware that it is not updated often and can be dated.

- *Florida Census State Data Center (SCD),* Florida Agency for Workforce Innovation offers online information from Census 2000 data at www.labormarketinfo.com with a chart for each county covering a lot of types of data. Projections of population growth are not available but this site does provide work flow statistics – where workers live and work, by county.

3. Federal/National

- *U.S. Census Bureau*, www.census.gov. The U.S. Census Bureau of the Department of Commerce is a goldmine of information about the most recent census but it does require digging through the many tunnels offered to reach census data. The Bureau's web site can be complex to the newcomer. Estimates about the future are not provided.

    - Best place for a newcomer to start when seeking demographic information: www.census.gov/main/www/cen2000.html. This page offers several tools for accessing census information. For Florida specific information from the 2000 census, go to http://www.census.gov/census2000/states/fl.html. This page also links to the current Florida Summary files.

        - Easiest tool: *State & County Quick Facts s*ummarizes the most requested data on states and counties. Tables offer 33 data points covering population (2000 and estimated beyond that) and percentages of total for an array of demographics (age group, sex, race, education, household income, etc.)

        - Most complete data tool: *American Factfinder* connects to tables and maps of Census 2000 data (and population projections to the past year) as well as other census related information services. Data retrieved by the searcher is more detailed than that in the State & County Quick Facts.

- *Public Library Geographic Database* (PLGDB) at www.geolib.org/PLGDB.cfm: The Florida Resources and Envrionmental Analysis Center (FREAC), Institute of Science and Public Affairs at Florida State University makes available on line a database of 16,000 U.S. public libraries and online tools for mapping demographic data and library locations.
- Other ways of getting information
  - *On population and housing statistics*
    - Information: Census Bureau Population Topics and Household Economic Topics
    - Email on population, including historical data: pop@census.gov
    - Email on income, poverty, housing, labor force, occupations: hhes-info@census.gov
  - E-sales: a product catalog is available at www.censu.gov/mp//www/censtore.html (cannot access as a link from this page)

Using Demographic Data

Demographic data about your service area can be used for several purposes, among them services and facilities planning, evaluation, and telling the library story to the public, support groups, and governing bodies.

Information such as population ethnicity, language spoken, number of people in age groupings, and economic well-being should be used to help guide long-range services planning (see Toolkit on planning). Facilities planners use population projections to help them decide how much space will be needed as far away in time as 20 years or more.

There are numerous publications available about using demographic data for these and other purposes so a detailed discussion is not provided here. These sources also discuss how to present such data for maximum impact, often recommending visuals such as tables and graphs. Public libraries also use Georgaphic Information Systems (GIS) to show data on maps of their service area. Maps can show any data that is in digital format and has spatial attributes such as population growth projections and other demographic information about a geographic area.

Many Florida cities and counties have GIS departments that will work with the library to present data in this format. Private company that provide mapping of US Census and other data are easily located on the Internet and some offer special services and programs for libraries, including mapping data from the library's integrated library system database.

Public Library Services Planning

Pl anning of services, facilities, and technology is critical to providing excellent public library service. Public libraries that do not have carefully developed plans often suffer from an application of the Pareto Principle that says 80% of effort tends to achieve 20% of results. Thoughtful planning focuses resources (collections, facilities, staffing, technology) to get more results from less effort.

This section of the Tool Kit discusses services planning, which is done in various time frames, using a variety of approaches.

- *Strategic planning* – a management tool used to help a library do a better job, to help focus its vision and priorities in response to a changing environment, and to ensure that everyone is working towards the same goals. Long-range strategic planning usually covers a three to five year time frame and anticipates an annual review and revision as needed. Part of the process is to build commitment to priorities among library users and keys stakeholders.

  The FLA Public Library Standards indicates the need for long-range services planning in three standards:

  - ➢ "The library has a long-range plan, an annual plan of service, and an annual budget [*Florida Statutes* 257.17(2) (e)]." This standard is also a requirement of the State Aid to Libraries Program.

  - ➢ "The library engages in joint planning for coordinating of library services within the county or counties that receive operating grants from the state [*Florida Statutes* 257.17 (2) (f)]." Again, a requirement for State Aid.

  - ➢ "The library undertakes a comprehensive and detailed long-range planning process at least every five years. The plan addresses services and resources of the library. The planning process includes systematic community input."

  Technology plans are a type of long-range strategic plan. They focus specifically on how the library will try to meet community needs related to technology-based services. Although they came into being primarily to meet requirements for federal financial assistance to libraries, library managers have long addressed technology in their general strategic plans.

- *Continuous planning* is a variant of strategic planning. This is planning at least annually to enable quick and effective response to a rapidly changing landscape. Some libraries in the nation are now using this approach rather than developing a multi-year plan that they update annually. Continuous planning in libraries is a response to the rapid changes occurring in recent years.

- *Operational planning* – planning for day-to-day implementation of strategic decisions; has shorter-term implications than does strategic planning and often overlaps with strategic planning processes.

Strategic or Long-Range Planning

Steps in long-range planning

Although there are many models for long-range planning, most have the same general approach:

1. Identify who will participate in the planning process and in what way (serve on a planning committee, attend a focus group, respond to a survey, and so forth)

2. Decide the time frame for the plan and the steps you will use to develop it (three years as opposed to four or five; develop a vision for service or not; use a published planning model or go it on your own; finish in three to four or six to eight months)

3. Decide how you will inform the governing body, the public, library staff and supporters about the planning activity and how they can participate; decide how you will publish the results when you are done

4. Collect information about the people in the library service area; analyze their needs and how needs evolve during the plan time frame

5. Collect information about the library's services; analyze what it says about the library's success in meeting needs

6. Define a vision for service and develop a focus for library services – set your priorities so you can use resources wisely to meet community needs

7. Develop a mission statement that describes what the library does

8. Establish goals and objectives for service so you can clearly state where you are going and how you will be able to tell if you are making progress towards getting there

9. Identify the actions the library will take to work towards goals (this is an overlap with operational planning); you may also identify resource needs in your plan

Public-Library-Specific Resources for Long-Range Planning

1. The Public Library Association (PLA) has published a series of planning models since the early 1980s. *The New Planning for Results*, by Sandra Nelson, offers an efficient model successfully used by libraries all over the nation since its publication by PLA in 2001. Detailed descriptions and examples of thirteen "service responses for public libraries" makes *PFR* uniquely suited to public library planning. Forms and suggestions for managing planning meetings are provided.

2. PLA also publishes *Managing for Results*, a follow-along book to *PFR* by Sandra Nelson, Ellen Altman and Diane Mayo. This tool provides procedures and forms for collecting data prepatory to assessing strengths and weaknesses in public library resources as part of the planning process.

3. *New Pathways to Planning* (http://skyways.lib.ks.us/pathway/) is a planning process for small public libraries created for the Northeast Kansas Library System in 1998 and updated in 2003. The New Pathways web site has an online version of the planning workshop for which the model was developed. It offers a customized alternative to *Planning for Results*.

4. Library Research Service at www.lrs.org has a Community Analysis Scan form on line that organizes this step in the planning process and links to data sources. Some sources are for Colorado only – see the section of this Tool Kit on demographic

information for Florida resources. This site and its form is suggested because it will help you control the librarian's urge to research indefinately.

5. Another way of looking at information about the library's service area user population is Geographic Information Systems (GIS) mapping. Population demographics and library user data that has spatial attributes, such as addresses or zip codes of people registered at a library, is plotted on maps to help planners understand its implications for service. Many Florida city and county governments have staff and software for GIS mapping, a resource that can be accessed by the library. This service can also be purchased from consultants and companies that work with population and library data.

Generic Long-Range Planning Resources for Government and Non-Profit Entities

1. Public libraries governed by county or municipal governments sometimes are asked to produce a plan concurrent with and using the same model as other departments. The International City/County Management Association (ICMA at www.icma.org and its Florida chapter (FCCMA at www.fccma.org) can connect library managers to planning models used for these purposes. ICMA does not offer a specific planning process but is an information resource.

   Planning models used by governments come and go with the times. Quality management based planning is an approach used in many Florida local governments. Others emphasize outcomes based planning and evaluation. Planning consultants are often used and many have developed their own models.

2. BoardSource, formerly the National center for Nonprofit Boards, at www.ncnb.org publishes *Strategic Planning and the Nonprofit Board*. It focuses on board planning as opposed to library services planning but is useful for public libraries governed in this way.

3. Nonprofit GENIE (Global Electronic Nonprofit Information Express at www.genie.org) offers information for educating governing bodies, library supporters and advisory boards about long-range planning.

4. The Innovation Group at www.ig.org provides a for-fee service to local governments and a number of Florida cities and counties are members. The Group has a Libraries networking group. The purpose of Innovation Group is to improve local government; strategic planning is one of their interests.

5. Price indexing is sometimes used by public libraries as they plan. The Consumer Price Index (US Bureau of Labor Statistics), Cost of Living Index (Research Associated of Washington), and American Chamber of Commerce Researchers Association (Cost of Living Index) produce indices that can be useful.

Operational Planning

Plans for the day-to-day work and events needed to carry out long-range plans may project activities over as much as a year or as little as a few weeks or a month. The planning that library staff members do to implement a grant project or a group of activities in the long-range plan is operational, for example – it considers the details of what will happen and who will do what, when.

Operational Planning Format

This format is helpful to organize operational plans and can be published to library staff members so they will be aware of not only what is planned but what their responsibilities are relative to plans.

Activity	Responsible person(s)	Begin and end dates	Resources needed/available	Notes	Progress

Data-based Decision Making as Part of the Planning Process

Operational plans are often dependent on resources available. *Managing for Results*, published by PLA and mentioned above, promotes the concept of making resource decisions – do we have enough of this, do we need more of that – based on hard data rather than management and staff perceptions. Resource categories in *MFR* are staffing, collections, facilities, and technology.

PLA offers other titles in the *Results* series that are helpful for gathering and analyzing data as you transition from long-range to shorter-term operational planning. Recent available titles are:

- *Staffing for Results: A Guide to Working Smarter*, Diane Mayo and Jeanne Goodrich, 2002

- *Creating Policies for Result From Chaos to Clarity*, Sandra Nelson and June Garcia, 2003

- *Technology for Results: Developing Service-Based Plans*, Diane Mayo, 2005

- *Demonstrating Results,* Rhea Rubin, 2005

Future titles will focus on fund raising and facilities management; other titles are expected through 2008.

Public Library Facilities Planning

The FLA Public Library Standards section on facilities is quite detailed. These detailed standards are both for evaluation of existing facilities and to assist library managers as they apply for state construction grants.Grant applications require comparison of the proposed new/renovated/expanded library building to standards. Facilities planning and evaluation is much broader than those few standards, however. This section of the Took Kit provides information as assistance to building planners.

Planning Approach

Inclusive planning

As with services planning, facilities planning should be approached as an opportunity to include not only library staff but also the public and respresentatives of governing bodies and support groups. This can be tricky. You probably don't want to engage in discussions about color schemes and staff offices with the general public but you do want to use their help in assuring that the building and location will meet their needs and fit well into the local environment.

Building committee

A building committee is customary for facilities planning, including for expansions and major renovations. It may, or may not, include representation from the general public but usually does include library management and representation from library staff, those responsible for facilities within the governing body, and support groups. Public opinion about needs and design can be sought through other means such as surveys, open meetings, and invited focus groups.

Determining Space Needs

Service plan driven

Deciding how much space is needed in a library building is based on many factors but the overriding determinor is the type and amount of service that will be provided in it, including support services. Service plans shape decisions about staff spaces and the number and type of collections, furnishings, and equipment that can be housed when the building is at maximum capacity.

Service, whether long-range or continuous, and technology plans are vital for facilities planning. If you first establish the focus and emphasis of your service and where you hope to take it in future, figuring out what kinds of spaces are needed is easy. There is a gap, though, between the three to five years of your services plan and the time frame for facilities planning (20 years). This requires some additional work to be sure adequate space for service growth will be available through those 20 years (or fewer if the library is located in a very high growth area and you anticipate needing expansion or another new building in less than 20 years).

Population change impact

Anticipated change in the service population is also an important factor in determining space needs, especially in our fast growth state.

Master building/facilities plans

Libraries and library systems in Florida frequently develop a long-term plan for library facilities development that brings together a discussion of population changes and service plans. Such a plan will identify projected sizes and locations of new/expanded buildings for a 20 year period or more. This has been very common in Florida and some libraries are on their second round of 20 year facility plans.

Size predetermined

A master building plan predetermines library facility space, or at least tries to project future needs. When the time to build comes around, however, those needs may have changed but library governing bodies are committed to the square footages in the master plan. New research into needs can sometimes make the impact needed to move them beyond an older building plan.

In some cases, facility size is predetermined when a governing body specifies gross square footage it can afford. This is an all too common situation and sort of puts the cart, space that will be available, before the horse – space needs as indicated by service plans.

Planning Tools

1. *Public Library Space Needs: A Planning Outline/1998*, by Anders C. Dahlgren, Wisconsin Department of Public Instruction, available in WORD and as a PDF at http://dpi.wi.gov/pld/plspace.html. This tool is easy to use to establish overall square footage need without first identifying a lot of detail. It can be useful in the early stages of planning. The entire document, including forms for calculations, can be downloaded without charge.

   Space allowances are generous; using this tool without adapting those allowances will almost always result in a 1.0 square foot per capita result (1.0 SF per capita is the FLA Public Library Standards Enhanced level). It can be easily adapted, however, by adjusting space allocations provided for calculating space needs in each step. The steps are:

          a. Determining design population

          b. Identify collection space needs

          c. Identifying reader seating space needs

          d. Identifying staff work space needs

          e. Identifying meeeting room space needs

          f. Determining special use space needs

          g. Determining nonassignable space (grossing factor) needs

          h. Putting it all together

   A dowloadable Space Needs Worksheet in Microsoft Excel can be used to make calculations. A list of space needs for representative types of equipment and special use space is provided

2. *Libris Design* is a library facility planning information system and downloadable database that was developed for California Public Library planners and is available at http://www.librisdesign.org. It can be used to develop a building program and make cost estimates and includes a powerful and complex database. Participation in training

is required to acquire the database. The web site offers online help for every step and a downloadable help document.

The database and any associated files may be used free of charge by anyone planning a public library. Training is provided by [InFoPeople](#) for a fee. *Libris Design* requires the software applications Microsoft Access 97, SR-2 or Microsoft Access 2000 (or newer).

Additional information available for downloading includes:

- General Requirements of the Public Library Building – files that can be inserted into your building program as "front end" documentation

- Glossary of Libris DESIGN Terms and Planning Assumptions (in the Help section) – definitions with drawings for selected definitions; the office system workstation definition has a lot of useful drawings to help with design using modular or landscape office furnishings.

- Narrative discussions or "papers" on various design related topics

- Information on new California libraries – picture galleries are of particular interest here but size and cost information is also useful for comparison purposes

3. Books on planning libraries are numerous. *Checklist of Library Building Design Considerations*, 4th ed., by William W. Sannwald and available from ALA stands out because it is a planning tool. If the building committee marches through this checklist they will leave few stones unturned in making the detailed decisions required to plan a building.

Information for Calculating Shelving Capacities and Shelving Space Needs

Common Shelving Types: Linear Feet Available

Shelving type	*# of shelves*	*Linear feet per 3' section*
84" high ▪ Single sided ▪ Double sided	7 14	21 42
78" high ▪ Single sided ▪ Double sided	6 12	18 36
66" high ▪ Single sided ▪ Double sided	5 10	15 30
42" high ▪ Single sided ▪ Double sided	3 6	9 18
Magazine ▪ 60" high ▪ Single sided	4	12

Square Footage Requirements per Section of Standard Shelving

Shelving depth	*Single sided*		*Double sided*	
	42" aisles	*36" aisles*	*42" aisles*	*36" aisles*
8" deep	12.5 SF	11 SF	14.5 SF	13 SF
10" deep	13 SF	11.5 SF	15.5 SF	14 SF
12" deep	13.5 SF	12 SF	16.5 SF	15 SF

Marketing and Community Relations Resources

Continuous communication with your community and stakeholders about library programs and services is a crucial function of library management. This fact is reflected in these standards. Such communication is a two way street, and involves listening to the community as well as informing it.

Information on using these standards to help carry the library message to the comm8unity is included in previous sections of this toolkit.

In addition, there are many excellent resources to help busy librarians plan community relations and marketing efforts. This is a very short list of some of them:

On the Web

http://www.olc.org/marketing/

A very good, free, self-paced introduction to marketing web course. Includes forms for planning and implementation; lists of further resources.

On the Shelves

McCook, Kathleen de la Pena. *A Place at the Table: Participating in Community Building. Chicago, ALA, 200.*

Siess, Judity A. *The Visible Librarian: Asserting Your Value with Marketing and Advocacy.* Chicago, American Library Association, 2003.

Weingand, Darlene E. *Marketing: Planning Library Services*. Libraries Unlimited, 1999.