

United for Libraries, the Association of Library Trustees, Advocates, Friends and Foundations, a division of the American Library Association, provides guidelines for Friends organizations that raise money from many donors, membership dues, fund-raising events such as book sales, and other activities throughout the year.

“Based on best practices from Friends groups across the country, **United for Libraries recommends that Friends groups divest themselves of approximately 80-100% of the funds they raise each year (minus operating costs) by giving the money to the library.**” Please consult Fact Sheet #22, “Guidelines for Giving,” at www.ala.org/united (last updated 2012), that outlines the reasons for these guidelines and suggestions about amassing funds for long-term capital needs projects.

Below is a sample document that can be developed by the Friends, the library’s administrators and staff, and the library’s Board of Trustees. ***The Friends of Libraries Section of the New York Library Association give permission to Friends organizations and libraries to edit and adapt this policy for their group’s needs.***

Guidelines for Expenditures of Funds of the Friends of the Idyllic Public Library

The **Purpose and Mission** of the Friends of the Idyllic Public Library is to support high-quality library resources for its community by raising funds through book sales and other activities, encouraging volunteer service, and advocating to elected officials for financial support of the library.

With funds that have been raised in support of the library, the Friends underwrite purchases of extra materials, programs, and equipment that cannot be provided by the Idyllic Public Library’s annual operating budget. After conferring with the IPL Staff Liaison, in consultation with the Library Director, the Friends Executive Board (as defined by the current by-laws) will decide how to spend these funds.

Staff members are requested to submit requests for Friends funds in writing to the Friends President, Treasurer, Staff Liaison, and Library Director no less than two weeks prior to the Friends meeting (monthly except April, July, and December). The Friends Treasurer will report the outcome of the Friends Executive Board’s vote to the appropriate staff member within one week of the meeting where action is taken on the request.

The following guidelines apply to requests for funds:

The Friends **generally will fund** the following:

1. Programs for all ages (i.e., honoraria, consumable supplies, refreshments, door prizes, etc.).
2. Equipment purchases **for public use** (i.e., public access computers, 3D printer, bookcases, etc.).
3. Equipment that will enhance the library’s environment (e.g., literature racks, program sign board, memorial plaque, shopping baskets, laminating machine for signage, self serve coffee machine, etc.).

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4. Materials for the library's collections or its maintenance (e.g., audiobooks, DVD collection, disc inspection and repair equipment).
5. Inventory of items to be sold as fund-raisers to benefit the Friends of the Library (e.g., coupon books, plastic tote bags, canvas tote bags, T-shirts).
6. Recognitions, thank you gifts, or contributions to receptions for individual Friends members or staff for outstanding service (e.g., books donated to the IPL collection in honor of a volunteer, restaurant or theatre gift certificates, floral arrangements, retirement gifts).
7. Nominal registration fees, meals, and mileage for library conference attendance or lobbying activities by Friends officers or appointed representatives of the Friends.
8. Supplies for Friends' projects and fund-raisers (e.g., flowers for landscaping, ads for book sale publicity, canopy rental for Friends' booth at community events).

The Friends **generally do not cover** funding for:

1. Supply costs (e.g., general office supplies, craft supplies, photocopying, printing, toner cartridges), unless these items are used by the Friends (e.g., copier paper and toner to produce Friends membership fliers and newsletters, postage).
2. Gifts for **individual** volunteers for regularly offered services *unless as recognition for service of a group of volunteers* (examples of gifts that could be covered: Junior volunteers' party refreshments, candy bars for book discussion leaders, T-shirts for teen drama group members, clip-on reading lamps for volunteers who provide delivery to shut-ins). These gifts generally cost less than \$5 per person.
3. Lodging in conjunction with library conferences or lobbying.
4. **Equipment for staff use** in the work room area (e.g., printers, task chairs).

Please note:

These guidelines are for the assistance of the staff and the Friends Executive Board in their decision making. They can be discussed with the Executive Board and decisions may be made outside of the scope of these guidelines.

Proposed by **Ad Hoc Committee on Friends' Expenditures** [comprised of the Friends President, Treasurer, another active Member, and Staff Liaison to the Friends]
July 13, 2012

Adopted by Friends Executive Board 8/8/12
Accepted by Board of Trustees, Idyllic Public Library 8/9/12
Reviewed and accepted with no changes 8/17/14
Amended by Friends Executive Board 4/19/15

Sample policy written by Lisa C. Wemett, Friends of Libraries Section, New York Library Association.
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FLS.NYLA@yahoo.com

last updated: 1/16/17