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*From the State Librarian*

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FROM THE STATE LIBRARIAN

Dear Public Library Directors and Trustees,

The State Library of Louisiana saw a need for a guide to help new directors and trustees, so we decided to create this Orientation Manual for Louisiana Library Directors and Trustees. This publication is a brief overview of public libraries in Louisiana, and will serve to assist librarians and trustees in their understanding of how libraries are governed and operated. It works in conjunction with our other publications, the Director Handbook for Louisiana Public Libraries and the Trustee Handbook for Louisiana Public Libraries. For more detailed information on any topic covered in this manual, please refer to the Director Handbook.

In addition, the Library Development Division at the State Library is there to give you, your staff, and your library board guidance and training about requirements, policies, and best practices in public libraries. Consultants on staff are always ready to provide help to public libraries and their boards.

The Utah State Library provided a wonderful role model for this publication. Their version of the publication is now in its fifth edition. With their permission, we drew from their publication to tailor a manual to provide guidance for the new Louisiana public library directors and trustees.

Thanks to Michael Golrick, Associate State Librarian, and Dorothy White, Board of Commissioners, State Library of Louisiana, who wrote this publication. Thanks also to those who edited it, including:

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Meg Placke, State Librarian
State Library of Louisiana
INTRODUCTION

WELCOME TO TODAY’S LIBRARY

Congratulations on your appointment as public library director or trustee! What a rewarding adventure you are beginning. We know you will find it a very satisfying experience and that you believe public libraries are the cornerstone of a true democracy.

ORIENTATION — PUTTING THE LIBRARY PIECES TOGETHER

This orientation manual is the State Library’s way of helping you to get started in your new job. It will help you know what to expect: what public library work is all about, what your role is, and how to do it in ways that meet the unique needs of your community.

YOU ARE NOT ALONE

The State Library of Louisiana is a primary resource for new directors and trustees. As the agency responsible for statewide library leadership and development, the staff includes librarians with expertise in a variety of subjects, and they are all available to help you become oriented to library service. You should feel free to call the Library Development Division at any time with any questions at (225) 342-4931.

Within Louisiana’s library community, you have plenty of colleagues to whom you can turn for advice, mentoring, and networking. Today, Louisiana supports 68 public library systems providing statewide coverage: sixty-one of these are parish-wide; one is a system for two parishes; two are city libraries in parishes that also have parish libraries; and one parish does not have parish-wide service, but instead has three municipal libraries and one district library that serves three towns and their outlying areas. These systems serve populations as small as 1,000 to almost 500,000, and all of their librarians and trustees are willing to share information and experience.

The state’s professional organization for librarians, the Louisiana Library Association (LLA), provides additional opportunities for professional public librarians’ growth and training. We encourage you to join LLA. For more information, visit their website at www.llaonline.org.

The national professional organization for librarians is the American Library Association (ALA). The mission of the American Library Association is to provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all. ALA is large and complex. State Library staff can help guide you to the part of the organization which will be most useful or can answer your questions. We encourage you to join ALA. For more information, visit their website at www.ala.org.

DID YOU KNOW?
Libraries are thriving. Public library collections are now bigger and more diverse, with almost half of their collections converted to digital and free to use.
THE PUBLIC LIBRARY

THE LIBRARY — TRADITION AND TRUST

The public library is a revered institution in communities all across this country, symbolizing the best in American values and culture. The responsibility now rests on your shoulders to ensure that your local library measures up to a long tradition of public trust and public service.

THE LIBRARY — A PUBLIC INSTITUTION

The concept of a free, tax-supported public library parallels the development of our nation’s public education system. The public library is often referred to as “the people’s university” because individuals of all ages and all backgrounds are welcome to use freely available library resources to pursue lifelong learning.

The public library levels the playing field for those who cannot afford access to information, making it affordable and accessible for all.

THE LIBRARY — MORE THAN A BUILDING

Most often the words “public library” conjure up the image of a prominent civic building. Usually, the building itself is a point of pride for the community that owns and supports it. The building becomes a community asset, however, when citizens feel the impact of the library. The library is more than a building because of quality collections, current information resources, trained staff, and professionally-managed programs and services.

THE LIBRARY — A GROWING ORGANISM

A healthy and productive library looks ahead and pursues opportunities for growth. There are always new fields of knowledge to acquire, new information formats to integrate, new technologies to implement, and new groups of users to address. Libraries engage in both short-term and long-range planning in order to remain current, fresh, and relevant to community needs.

In 1931, S. R. Ranganathan proposed The Five Laws of Library Science, which are still pertinent today:

1. Books are for use.
2. Every person his or her book.
4. Save the time of the reader.
5. A library is a growing organism.
WHAT DOES THE LIBRARY DIRECTOR DO?

The director of a public library holds the vision of how the library will serve and be viewed by the community. The public library director is also the administrator and manager of the organization with the ultimate responsibility for the successful operation of the library.

The library director works with the board to determine the vision of the library. Together, they codify what the role of the library is in the community, and how that role is fulfilled.

The library director plans and carries out library service objectives, prepares budgets, purchases materials and equipment needed to run the library, supervises employees, arranges for maintenance of the building and grounds, creates publicity for the library, prepares grant applications, collects statistical data to evaluate the effectiveness of the library, and establishes cooperative relationships with the library board and governing authority. The director also serves as the lead professional librarian who is knowledgeable of library best practices, sets an example for others in the delivery of reference and readers’ services, and uses technology to enhance library operations.

GET ON BOARD QUICKLY

As a new director, it is vital that you learn a few things about your new job and your working environment as soon as possible after accepting your position.

One way to acquaint yourself with the library and your new responsibilities is to do a walk-around, look-around tour. Tour the building, grounds, and all offices. Visit with staff, board members, and your counterparts in local government one on one. Ask open-ended questions (what do you like best/least about working here) and listen carefully to the answers. As you continue in your job, this technique of management by walking around (MBWA), spending some time listening to problems and ideas of your staff, can be an effective and practical way to keep up with what’s happening within your staff and organization. You will often gather more information on what is really happening by having these conversations in their workspace rather than waiting for any individual to come to your office.

The director must have an efficient workspace. Make it a priority to organize the director’s office so it works for you. You should have fingertip access to certain files, statistics, and directories that you need on a daily basis, or may need at a moment’s notice.

Be prepared to respond to the staff, public, press, and library board. Accurate information about the library is an important part of a director’s job.

Locate your budget and grant information. If you don’t know how your library is funded, find out immediately. Schedule a meeting with the board chair and the budget officer for your funding authority. Do not wait until a new budget is due. If you are unsure about the status of a grant, contact the State Library.

DID YOU KNOW?

There are 68 public library systems in Louisiana, with 335 locations, and 28 bookmobiles. There were just five public libraries when the State Library began operating in 1925.
THE LIBRARY BOARD

WHY DOES THE LIBRARY HAVE A BOARD?
A library board is created by law to act as a citizen control of the library. In Louisiana, the law is clear that the parish or municipal authorities must appoint a “board of control” to oversee public library operations (La. R.S. 25:214). The library board is answerable to the governing body that appoints them and to the citizens they represent. With some exceptions, parish boards have between five (5) and seven (7) members and municipal boards have five (5) members. Almost 500 citizens in Louisiana serve on library boards.

RESPONSIBILITIES OF THE BOARD
Members of a library board are often referred to as trustees. The main responsibilities of a trustee include promoting the mission of the library, setting appropriate policies for library services, advocating for library issues, overseeing public funds, and working to retain a qualified director.

DIRECTOR AND BOARD: PARTNERS FOR LIBRARY SERVICE
The library director is a crucial partner to the board in planning and administering library service. The director is responsible for administrative activities and the day-to-day operations of the library. The board serves as the eyes and ears of the community and provides invaluable guidance for planning library service.

BOARD HOUSEKEEPING
Public libraries are established by the Police Jury or Parish Council, who appoints the members of the library board. Every library board should have established bylaws, a set of rules that define the structure and function of the board and its operational procedures. These bylaws are approved by the local governing authority and become a part of local ordinances.

The board chair and library director are responsible for ensuring that board appointments are kept current and reported to the State Library. All new appointees should receive an orientation, and periodic refresher training is recommended for the whole board. Board members should be encouraged to attend training and workshops sponsored by the State Library, LLA, and other library organizations.

ASSOCIATE STATE LIBRARIAN MICHAEL GOLRICK meets with the Eunice Public Library Board on July 27, 2023. The meeting is where Golrick announced to the board and Director Alison Duplechin that the Eunice Public Library had been officially recognized by the state.
HOW ARE LIBRARIES FUNDED?

In Louisiana, all but a few library systems are funded by a parish-wide dedicated property tax. The tax rate is suggested by the director and proposed by the board, who requests and justifies a tax election to the governing authority. The governing authority sets the millage after consultation with the board and calls a tax election. This tax is then voted on by the people.

The tax rate, or millage, is generally set for a 10-year period. Whenever properties are reassessed (that is, their values are updated to the current market), the rate may be changed so that the total amount raised by the tax does not increase or decrease (roll back or roll forward). A few libraries are supported by a partial property tax and/or a dedicated sales tax. Municipal libraries are most often funded by a direct appropriation from the municipality’s budget.

Some parishes receive a state revenue sharing payment which is intended to make up for the homestead exemption, with a specified amount set aside for the library. In the past, the legislature has sometimes provided for “state aid to public libraries” within the state budget. The State Library distributes those funds.

The library may also seek grants from other state and federal agencies, from local, state, regional and national foundations, and from local Friends of the Library groups.

Your library will also most likely have income from fees (such as fax, copies, printing, etc.) and fines. If the library owns buildings that are not being used for library purposes, or has a fund balance or investments, the library may receive additional revenue from those sources. The annual state statistical report is prepared by the library director and will ask you to report all sources of income by type.

THE BUDGET PROCESS

The library director drafts the library budget with board oversight and with guidance from the budget manager of the parish. Preparation of the budget starts about six months ahead of time. The rule-of-thumb percentages in a library budget are: 50-70% personnel, 10-20% materials, and the balance for all other expenses. Grant receipts and expenditures must be tracked separately.

If this is your first budget, don’t assume that budgets of the past correctly reflected the library’s resources. Scrutinize the current budget to ascertain that the library’s revenues and expenses are itemized correctly. Be sure you understand the accounts and balances you are working with and keep digging for clarification. Become familiar with the Louisiana Legislative Auditor’s Chart of Accounts, which is intended to aid local government in implementing modern financial management practices.

Some libraries in Louisiana have asked the legislature to grant them fiscal emancipation. If granted, it means that the library writes the checks to pay bills instead of the governing authority. Eighteen parish libraries are fiscally emancipated.
LIBRARY CORE SERVICES

Libraries serve as the collective memory of our society. In order for a library to operate as an organized repository for the acquisition and dissemination of recorded knowledge, certain activities are routinely performed. The functions that form the foundation for library service are:

1. administration of the library,
2. building the collection,
3. making the collection accessible for use, and
4. serving the public.

New directors should become informed about philosophies and standard practices in these core service areas. Technology affects how many library services are delivered today, so the director needs to become aware of advances in library automation and other library-enhancing applications, and keep the board informed.

STATE LIBRARY SUPPORT FOR CORE SERVICES

Recognizing that many of Louisiana's public libraries have limited resources to provide in-depth library service, the State Library serves as a backup for these libraries. Specifically, libraries can call upon the State Library for help in answering reference questions, cataloging instruction, interlibrary loan service, collection development tools, technology issues, and “how-to-do-it” library literature. The Library Development Division has a staff of experienced library consultants who can advise the director and board on topics such as administration, planning, personnel, E-rate, and legal and ethical issues.
LIBRARY IMAGE: POLICIES AND PERSONNEL

WHAT'S YOUR IMAGE?
Public opinion about the library is significantly influenced by the policies that are in place governing the use of the library and the quality of service that library users receive when they visit the library. Directors and library boards are advised to take time to develop thoughtful policies, record the written policies in a manual, and ensure that the staff is trained to interpret and apply the policies appropriately and consistently. We suggest you ask staff to sign a “receipt of policy” and keep that as part of the personnel file for each staff member.

DEVELOPING LIBRARY POLICIES
Developing policies to guide the operations of the library is one of the shared duties of the library director and library board. The director, with input from the staff, is responsible for articulating the policy issues to be addressed and proposing solutions that conform to generally accepted library practices. The policies should be submitted for review by the legal department of local government to ensure the policy’s enforceability. Once approved, the policies are then adopted by the board.

COMPILING LIBRARY POLICIES
Written policies are essential to effective library operations. A policy manual helps ensure fair treatment of all patrons and staff conformity to local, state, and federal laws, and quality service for everyone in the community. The policy manual may contain internal policies as well as directives from outside the organization, such as personnel and labor laws.

PROCEDURES FOLLOW POLICIES
Although the board sets the policy, the nuts and bolts of putting it into action are delegated to the library director, and from the director to the staff. Policies are implemented through internal procedures that should be put in writing for staff to refer to. Procedures are the step-by-step actions needed to carry out specific tasks and should be written in sufficient detail so that someone unfamiliar with the job can perform the function. We suggest two documents: a policy manual and a procedure manual.

PERSONNEL — MAKING POLICIES WORK
The library board employs the library director and sets salaries and compensation for the entire staff. The library director is responsible for hiring, training, and supervising a competent workforce. The staff then enforces the library’s service policies and is in essence the face of the library. The library director should make sure that all library job descriptions are current and contain a reference to desired customer relations skills.

DID YOU KNOW?
The library staff is the most effective public relations tool the library has.
INTERNET POLICIES AND INTELLECTUAL FREEDOM

THE INTERNET DILEMMA

The Internet is about open access to a worldwide network of information and ideas. Libraries have internet stations for public use in order to provide the greatest range of resources for their patrons and to ensure equal access to online information for everyone in the community. This commitment to an individual's right to seek information via computers positioned in a public space has forced libraries to adopt thoughtful and clear internet policies that meet several legal tests.

POLICY REQUIREMENTS FROM THE FEDERAL GOVERNMENT

The Children’s Internet Protection Act (CIPA) requires libraries and schools to install technology protection measures on their internet computers if they wish to receive discounts on internet services (E-rate). An additional proviso requires that the library have a means for disabling the filter at the request of an adult. CIPA directly affects eligibility for E-rate telecommunications discounts and Library Services and Technology (LSTA) technology grants.

PRINCIPLES AT RISK: INTELLECTUAL FREEDOM AND FREEDOM FROM CENSORSHIP

Intellectual freedom is a core value of the library profession. Censorship is any change in the access status of material, based on the content of the work and made by a governing authority or its representatives. The library profession opposes censorship. Libraries support an individual’s right to freely choose reading and information sources.

From the library perspective, it is the right of every individual to both seek and receive information from all points of view without restriction. It provides for free access to all expressions of ideas through which any and all sides of a question, cause, or movement may be explored. All aspects of library service — from the selection of materials for the library and patron library records, to public use of meeting rooms and internet use — are affected by the principles of intellectual freedom.
WHAT IS A LONG-RANGE PLAN?

- It is a road map or a series of directions to get from one place to a better place.
- It is a logical process that leads to change or improvement.
- It helps groups and individuals make better-informed decisions that result in responsible and productive actions.
- It increases the effectiveness of the organization and assures that the stated goals and objectives will be reached.
- It requires future-oriented thinking; that is, what do we want to happen, provide, or change in library facilities, services, or technology?

WHO PLANS?

The library board, in partnership with the library director and staff, as well as stakeholders in the community, engages in ongoing and comprehensive planning activities. When library planners put down on paper the goals and objectives that the library hopes to accomplish over a three-year period, they commit themselves to making it happen.

The Public Library Association has published a definitive book on planning for public libraries: *Strategic Planning for Public Libraries* by Joy L. Fuller.

The State Library owns multiple copies of this book that you can request through interlibrary loan (call number 025.1974 Ful 2021). In addition, it is available electronically, including the worksheets that you may print out as needed. The State Library collection also includes other books on planning that are available through interlibrary loan. Library Development staff are available to make suggestions for other planning resources.

TECHNOLOGY PLAN

While technology plans are no longer required for FCC Universal Service (E-rate) discounts, it is still a good idea for every library to plan for technology needs and review the plan annually. Technology upgrades are always occurring and can be an expensive item in the budget. Planning will help you save to cover this. Library Development provides E-rate support for any questions you may have about that program.
RESPONSIBILITIES OF THE STATE LIBRARY OF LOUISIANA

The Louisiana Revised Statutes require that the State Library of Louisiana “shall plan and work toward a coordinated system of parish and regional libraries throughout the state so as to give and furnish every citizen and resident of the state free library service of the highest quality consistent with modern methods...” (R.S. 25:8). The State Library plays a key role in facilitating discussions on statewide issues, conducting training programs, coordinating resource sharing, and making site visits to meet and consult with library directors, trustees, and local elected leaders.

The State Library of Louisiana provides strong supplemental support to all 68 systems through its statewide projects and initiatives, including educational and informational databases with access through the public libraries, technology support, an interlibrary loan system, continuing education, children’s services, and consulting services. The Louisiana Book Festival is the Louisiana Center for the Book’s primary event in achieving its mission to promote literacy, reading, and education and to showcase Louisiana authors, publishers, and books about or set in Louisiana. It also includes culinary arts, visual arts, and Louisiana music.

The State Library has three major programs:

- **Library Resources,**
- **Library Development,** and
- **the Talking Books and Braille Library.**

As part of Library Resources, the Reference Department answers reference questions from citizens, state employees, and public libraries, and is responsible for purchases for the State Library collection. The Louisiana Department includes everything about Louisiana or written by Louisianans, as well as access to the Louisiana Digital Library. Within the Technical Services Department, the Louisiana Public Document Depository Program collects copies of all public information produced by state agencies and distributes them to depository libraries across the state. Electronic documents are maintained in an online digital archive.

The Library Development Division provides consultative assistance and training to public and institutional libraries across the state. Consultants from the State Library visit each library system and are available to advise directors, staff, and trustees on planning, programs, new services, construction, administration and management of libraries, and legal and ethical issues.

The staff members of the Talking Books and Braille Library work together to send recorded books, playback machines, large print books, Braille books and other library materials to Louisiana citizens who qualify for this free service because they are unable to read or to hold standard printed materials.

Within the organizational structure of Louisiana state government, the State Li-
The State Library is mandated to document the progress of library service statewide. In order to fulfill this responsibility, the State Library is authorized to conduct surveys, collect statistics and planning documents, administer grant programs, and enforce selected library laws. In turn, the local library director is expected to comply with State Library requests for information and to submit any required reports and documents in a timely manner.

The annual report, due by April 1, is compiled and subsequently published. Library directors are notified well in advance of the deadline. The printed volume, *Public Libraries in Louisiana: Statistical Report*, is sent to every public library director and trustee. It is also available on the State Library’s web site.

Library Development also maintains a database of current library directors and trustees. Please report any changes promptly.

For more information or to report changes, contact Library Development at (225) 342-4931 or e-mail libdev@library.la.gov.
TRAINING AND PROFESSIONAL DEVELOPMENT

TRAINING IS ESSENTIAL

Training is a key component in the professional growth of a library director and the director’s ability to cultivate good library service. Ideally, commitment to training will be a goal shared by both the library board and governing authority. Library budgets should contain specific line item funding for staff development. Additionally, the library director should be aware of other free and affordable training and learning opportunities.

TRAINING OPPORTUNITIES

The State Library offers an annual Administrative Conference. This is an opportunity to meet with colleagues from around the state, and to learn about what is happening in other libraries, both in Louisiana and nationwide. For new directors, we encourage attendance at the “New Directors’ Boot Camp.”

The State Library also offers an annual “Staff Day” that covers different topics each year. In addition, workshops are offered on a variety of topics in different locations around the state, including support for the summer reading program (for children, teens, and adults). State Library staff are also available to help you with development opportunities for your staff. We encourage public library staff to participate in the Library Support Staff Certification (LSSC) program. For more information, contact Library Development at (225) 342-4931 or via e-mail at libdev@library.la.gov.

The State Library offers trustee training for library boards upon request.

The Louisiana Library Association (LLA) sponsors an annual conference, as well as mini-workshops throughout the year. The State Library partners with LLA in planning training programs.

PROFESSIONAL LITERATURE

The State Library maintains a collection of materials on library management and information technology that are available for libraries to borrow through interlibrary loan. The collection contains newly published works as well as classic texts. Newcomers as well as experienced librarians will find something useful in this collection to further their professional knowledge. You can search for titles in the State Library online catalog, or you can go to the LibGuides section on our website for guidance and bibliographies. You can request any items the State Library owns through interlibrary loan. You can also submit requests for the State Library to purchase items to the Reference Department via e-mail, ref@library.la.gov.

DID YOU KNOW?

Louisiana has the highest number of people who have successfully completed Library Support Staff Certification training in the United States.
CHECKLIST

DOCUMENTS TO HAVE ON HAND

• Library Laws of Louisiana
• Local library ordinance
• Board bylaws
• Minutes of past board meetings
• Budget documents
• Annual reports
• Policies and Procedures Manual
• Record retention schedules
• Internet policy, including staff social media
• List of board members
• List of staff members
• List of local government officials
• List of local non-profits and community partners
• Job titles and position descriptions for all staff
• Documents pertaining to the history of the library
• Documents pertaining to a new building project
• Bylaws and minutes from friends group or foundation, if applicable

LAWS YOU SHOULD KNOW ABOUT

• State laws pertaining to libraries; for example, bid law, purchasing, auditing, surplus
• City and parish ordinances
• Americans with Disabilities Act (ADA)
• Fair Labor Standards Act (FSLA)
• Family Medical Leave Act (FMLA)
• EEOC sexual harassment regulations
• Title VII Civil Rights Act of 1964 (Anti-Discrimination)
• OSHA Bloodborne Pathogens — Standards
• Local ordinances — building and safety issues
• Emergency evacuation and workplace safety rules
• Ethics
• Financial disclosure

TRAINING YOU SHOULD HAVE

• Cybersecurity training for all new staff and any board member with a library e-mail or access to library files
• Mandatory training should include:
  1. Sexual harassment prevention (annual, all staff and supervisors)
  2. Ethics (annual, all staff and board)
ORGANIZATIONS

STATE LIBRARY OF LOUISIANA
701 North Fourth Street
Baton Rouge, LA 70802
Library Development: 225-342-4931
www.library.la.gov

LOUISIANA LIBRARY ASSOCIATION
1190 Meramec Station Road, Suite 207
Ballwin, MO 63021
Phone: 225-922-4642
Toll Free: 877-550-7890
www.llaonline.org/

AMERICAN LIBRARY ASSOCIATION
225 N. Michigan Ave., Suite 1300
Chicago, IL 60601
Phone: 800-545-2433
www.ala.org

PUBLIC LIBRARY ASSOCIATION
A Division of the American Library Association
225 N. Michigan Ave., Suite 1300
Chicago, IL 60601
Phone: 800-545-2433
www.pla.org

UNITED FOR LIBRARIES
ASSOCIATION OF LIBRARY TRUSTEES,
ADVOCATES, FRIENDS AND FOUNDATIONS
A Division of the American Library Association
225 N. Michigan Ave., Suite 1300
Chicago, IL 60601
Phone: 800-545-2433
www.ala.org/united/trustees

LOUISIANA RESOURCES

DIRECTOR HANDBOOK FOR LOUISIANA PUBLIC LIBRARIES (available online)

TRUSTEE HANDBOOK FOR LOUISIANA PUBLIC LIBRARIES (available online)

PUBLIC LIBRARIES IN LOUISIANA: STATISTICAL REPORT
(published annually and available online)

LIBGUIDES
Subjects and resources on a variety of topics
https://slol.libguides.com

LIBRARY LAWS OF LOUISIANA
(available online)

LOUISIANA STATUTES
(REVISED STATUTES) SEARCHABLE SITE
http://legis.state.la.us/lss/tsrsssearch.htm

LOUISIANA LIBRARY CONNECTION
http://lalibcon.state.lib.la.us

STANDARDS FOR LOUISIANA PUBLIC LIBRARIES
(available online)