Library Policies:
Best Practices for Strong Library Policies

OLA 2024 Pre-Conference

Co-Sponsored by IFC and TSRT

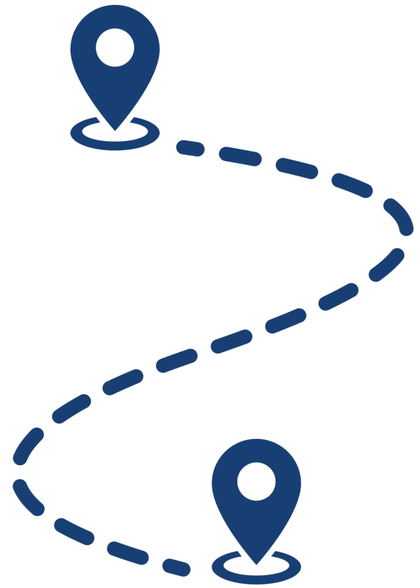
Introductions

Emily O'Neal // Lizbeth Chavez Villasenor

Adrienne Doman Calkins // Marie Felgentrager

Our roadmap

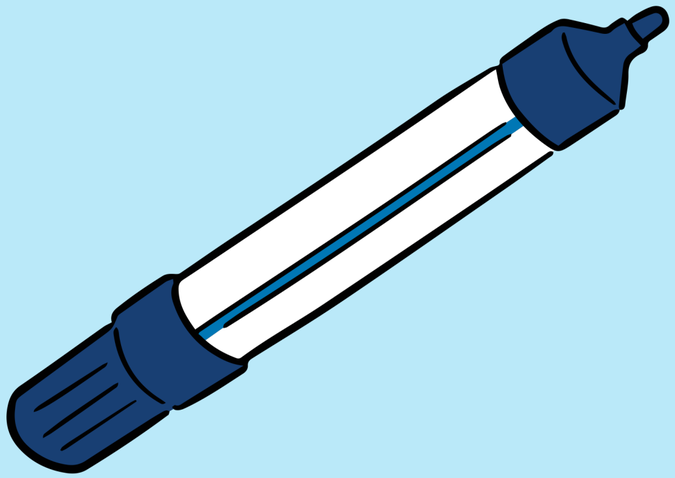
- Introduction--definitions and concepts
- Rules of Use and Behavior Policies
- Collection Development Policies
- Hands-on activity
- Closing thoughts



Our gift to you:

A Policy Action Plan

When you think of a scenario from your library...



or

Whova

Let's
START

What we'll cover in the Intro

- Definitions
- Putting it all together
- Politics
- Decision-making
- Green & Red flags
- If you don't have the authority...
- Lenses to apply

Definitions

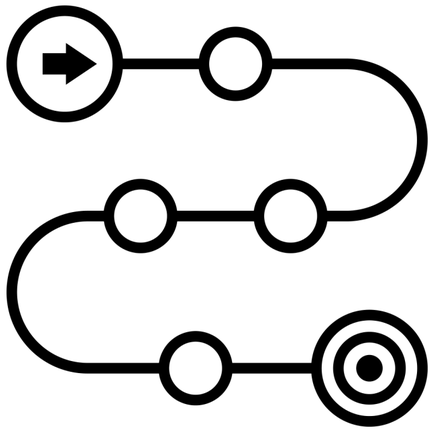
Do you know the difference between a policy, process, and procedure?

Policy

- The rules and guidelines used to ensure consistency and compliance with governance and laws.
- Defines the what, who, and why.

Process

- The steps to follow.
- Addresses who, what, and when.



Procedure

- The specific instructions.
- Details the who, what, when, and how.

Let’s put it together.

Policy

Process

Procedures

Policy → **Process** → **Procedures**

- Rules & guidelines
- Consistency
- Laws
- Mission, Vision, Values
- Strategic Plan

Policy

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Process

- Steps
- Who is responsible?
- What are the major functions?

Procedures

Policy

- Rules & guidelines
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Process

- Steps
- Who is responsible?
- What are the major functions?

Procedures

- Instructions
- Who will perform the tasks?
- What are the specific tasks?

Politics

Who officially adopts the policy?

- County Commissioners
- Library Board
- Management
- City Council
- School Board

What are the oversight mechanisms?

Who drafts the policy?

- Librarians?
- Board?
- Governing body?

Who are the decision-makers at your library?

Who are your allies in policy work?

Decision-making

It’s different for everyone!

Levels of authority

1. Adopts rules and policies.
   Final decision-maker.
2. Review and approve.
   Accountable.
3. Create, recommend, and follow policy.
   Implement procedures.

Public School example

1. School Board
2. Superintendent / School Principal
3. School Media Specialist, Librarian, or Teacher

Independent Library District example

1. Library Board
2. Library Director
3. Staff subject matter experts

County Public Library example

1. County Commissioners
2. Library Advisory Board
3. Library Director

Academic Library example

1. Dean of Libraries
2. Collection Management Department Head
3. Collection Development Team

Municipal / City Library example

1. City Council
2. Library Advisory Board
3. Library Director / Executive Team / Staff

Green & Red Flags

Green flags to look for

- Objective
- Clear
- Systematic processes
- Roles & responsibilities
- Final decision-maker
- Intellectual Freedom

Red flags to avoid

- Subjective
- Vague
- Content value statements

Red flags to avoid

Anything that leaves you unsure on...

- What the process is
- Who gets to decide
- What criteria are applied.

If you don't have the *policy* authority...

Lenses to apply

Equity & Trauma-Informed Lenses

- Actively work together to improve equality
- From neutrality to antiracism
- Create physical and psychological safety
- Communities and individuals are struggling

Intellectual Freedom & Legal Lenses

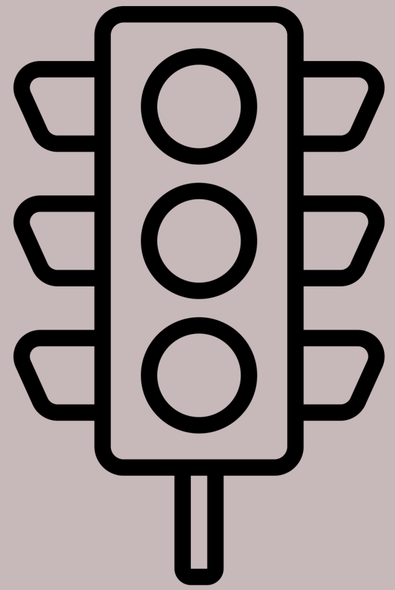
- Access
- Bias
- Objective
- First amendment
- Privacy
- Legal review

Reflection & Sharing

Questions on the Intro?

Let’s move to the next section

Rules of Use & Behavior Policies



Rules of Use & Behavior Policies with an equity lens

Lizbeth Chavez Villasenor

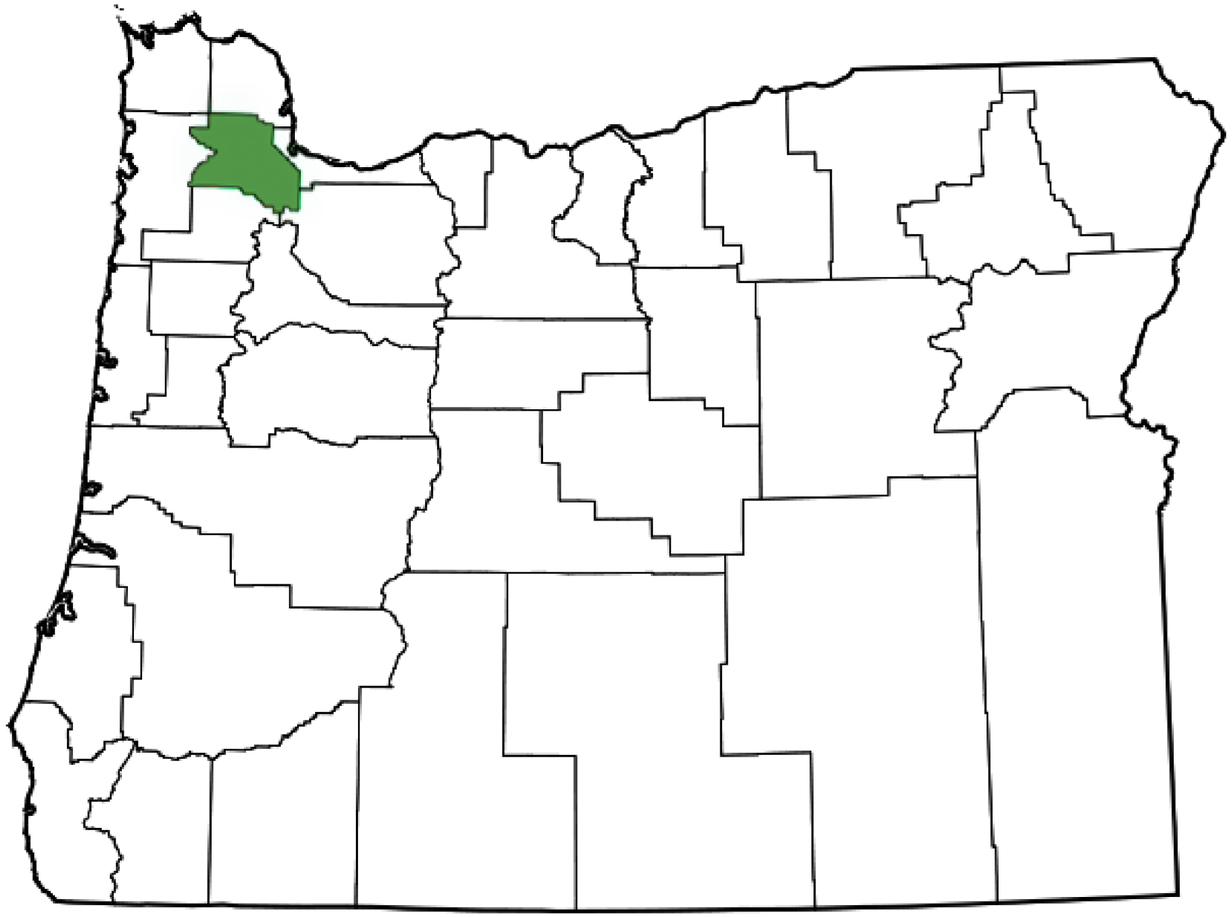
Beaverton City Library

&

Adrienne Doman Calkins

Sherwood Public Library

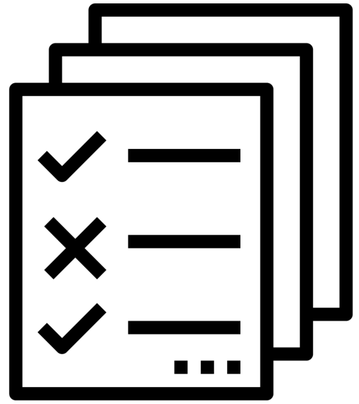
Where we work



What we'll cover

- Purpose of this type of policy
- Beaverton's story
- Using Equity Everyday Cards
- Sherwood's story
- Examples of changes we made
- How do these policies affect day-to-day work?
- Did anything get better?

Purpose of a Rules of Use / Behavior Policy



- Protect the rights and safety of library users and staff.
- Preserve and protect library property.
- Ensure a welcoming, safe, secure, and enjoyable environment.

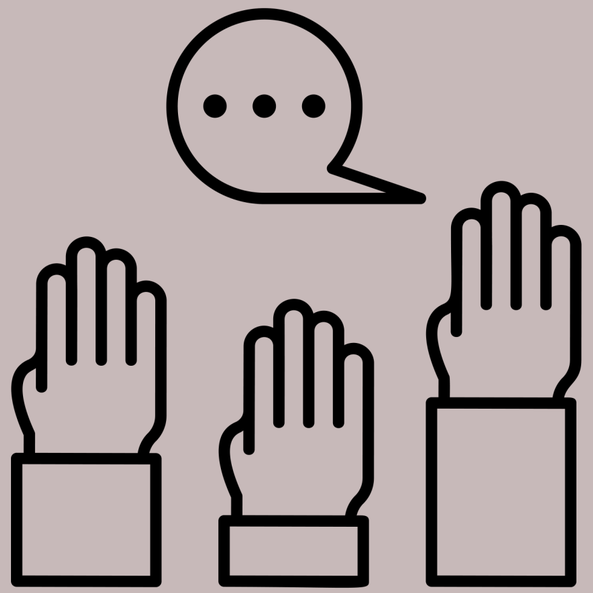
Let’s look at the levels of authority again.

Municipal / City Library example

1. City Council
2. Library Advisory Board
3. Library Director / Executive Team / Staff

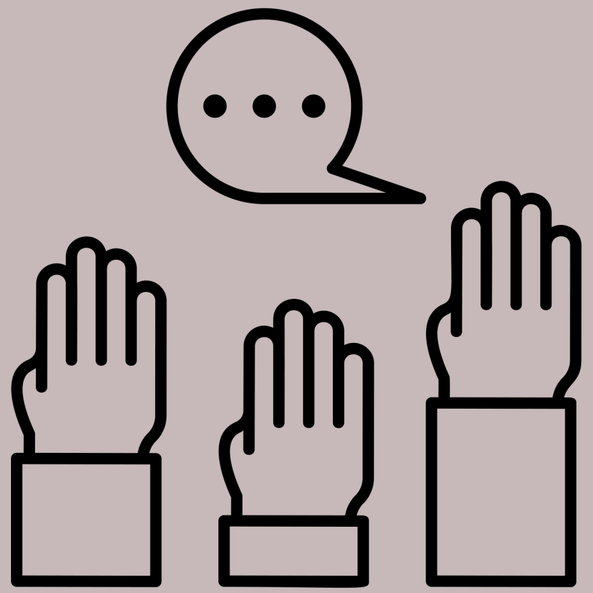
Beaverton’s story

Anti-Racism Action Committee



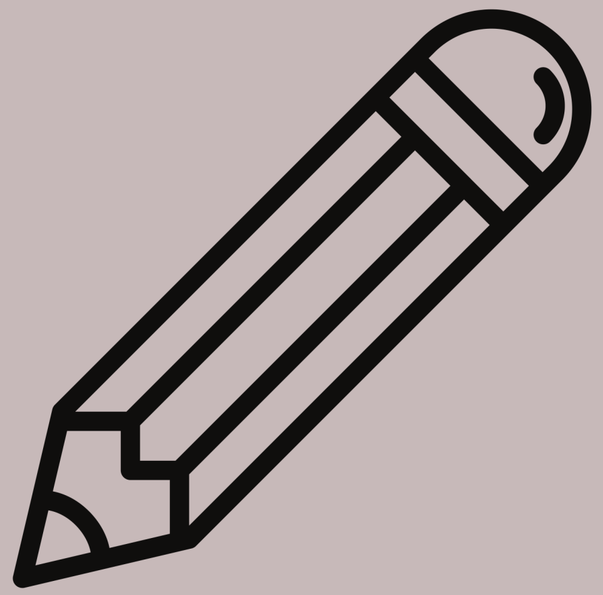
- Established in 2020
- 7 staff & 1 manager/supervisor
- Monthly meetings
- Yearly recruit new members

Anti-Racism Action Committee



- Annual goals
  - Policy
  - Self-reflection, Talk Story
  - Transition
- Subgroups

Equity Every Day cards



- What they are.
- How we use them.
- Examples of why it works.

Equity Every Day cards

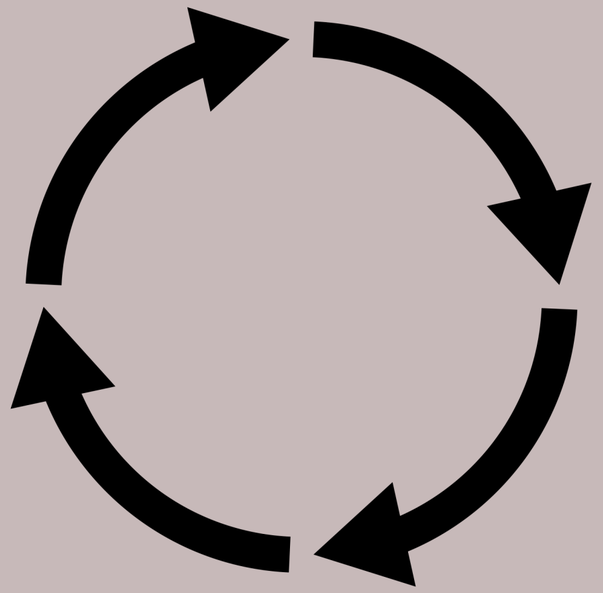
EQUITY EVERYDAY

Keep these 3 questions in mind as you make decisions in your work.

- Whose voice is and isn't represented in this decision?
- Who does this decision benefit or burden?
- Does this decision close or widen access gaps?

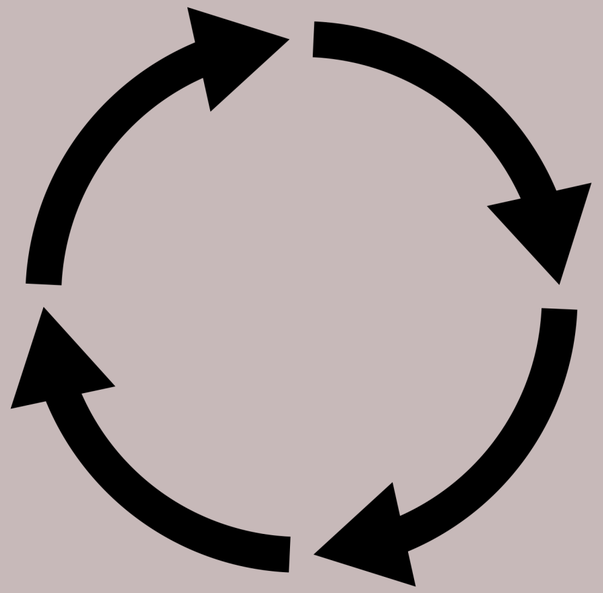
BEAVERTON CITY LIBRARY

Policy reviewing

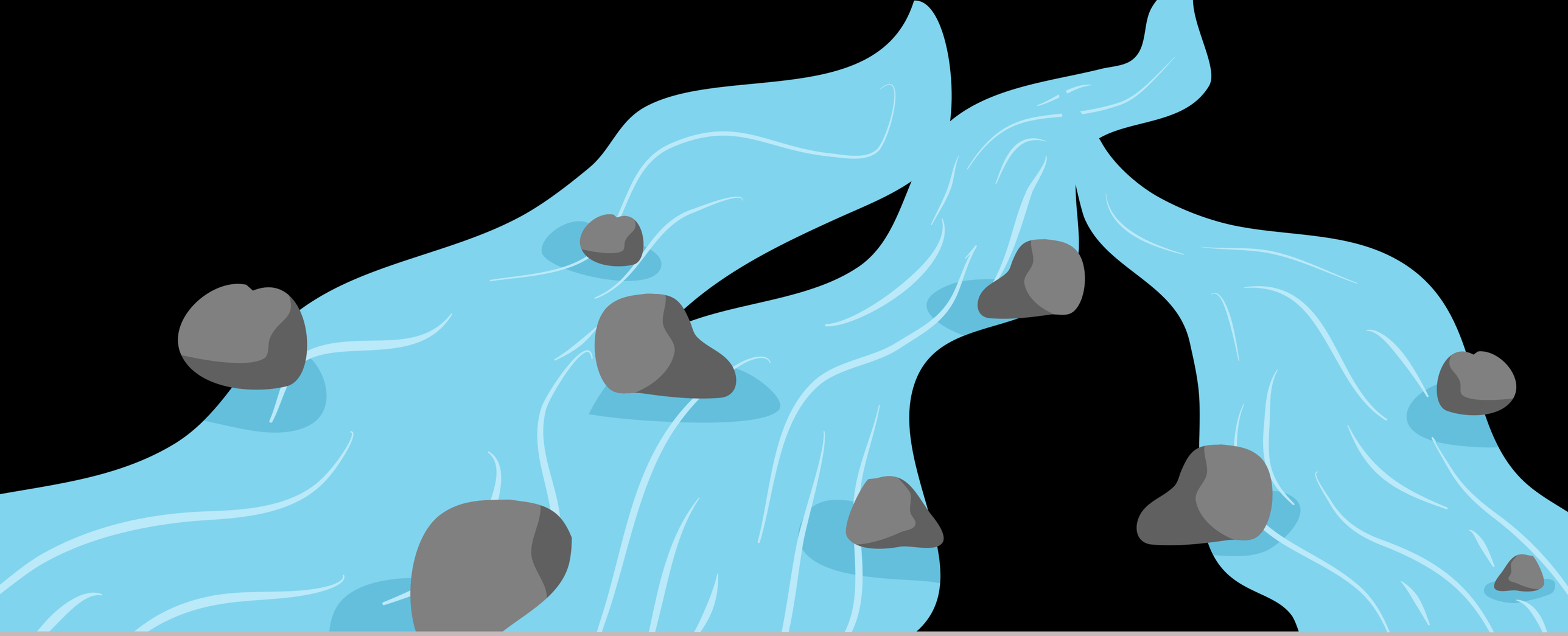


- Choose a policy
- Homework: review
- Share edits
- 2 members assigned

Policy reviewing



- Executive Team meeting
- Core meeting
- Legal
- Library Advisory Board
- Staff training



Sherwood’s story

Moving the needle

- Equity & Trauma-informed lens
- Building scaffolding through training

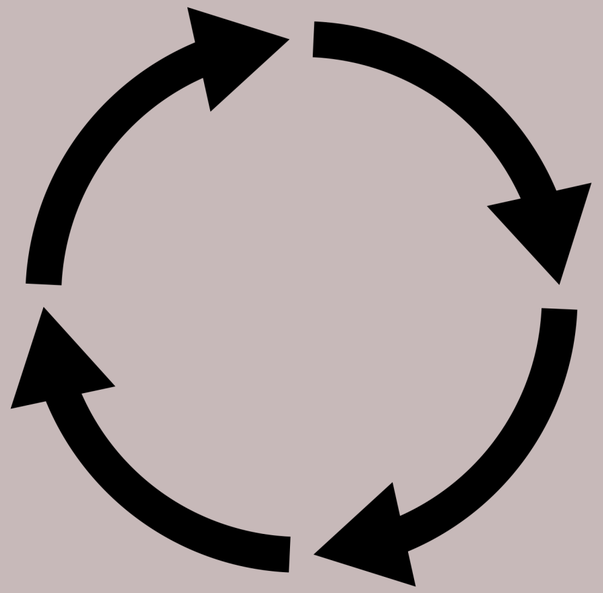
Training ideas

- EDIA & social justice
- Trauma-informed services
- Local social services
- Mental health & suicide prevention
- LGBTQIA+ affirmation & inclusion
- Disability awareness

More training ideas

- De-escalation techniques
- When to call police, what happens when you do
- Self-defense & active shooter
- Narcan, CPR, & first aid
- Scripts, role plays, cheat sheets
- The OLA session on Thursday, April 25, 2:15pm -- “Policy Talk: Patron Codes of Conduct”

Iterative processes



- Embracing the draft
- Staff, board, legal reviews
- Working with elected officials
- Letting go of perfection

Mindset

What changes did we make?

- Taken out
- Added
- Tone / style
- Procedures
- Implementation

How do these policies affect day-to-day work?

Did anything get better?

Now think about your work...

Resources

- Balzer, C. (2022, January 3). Uptick in First Amendment Audits. https://tinyurl.com/firstaudit
- Barski-Carrow, B. (2018). When trauma survivors return to work: Understanding emotional recovery. University Press of America.
- Beaverton City Library Policies, www.beavertonlibrary.org/101/Policies.
- Doman Calkins, A. (2022). Approaching the Library Behavior Policy with Justice and Access at the Forefront. OLA Quarterly, 27(2), 32–39. https://doi.org/10.5399/osu/1093-7374.27.02.7
- Farkas, M. (2021, October 18). What is slow librarianship? Information Wants To Be Free. https://tinyurl.com/slowlibrary
- Oregon Library Association. (2020.) Equity, diversity, inclusion & antiracism toolkit. https://tinyurl.com/y6ttnm82
- Sherwood Public Library policies. www.sherwoodoregon.gov/library/policies
- Tolley, Rebecca. (2022). A trauma-informed approach to library services. ALA Editions.

Questions?

Lizbeth Chavez Villasenor

lsauervillasenor@beavertonoregon.gov

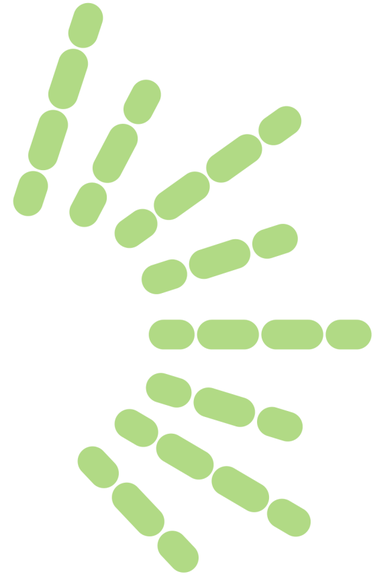
Beaverton City Library

Adrienne Doman Calkins

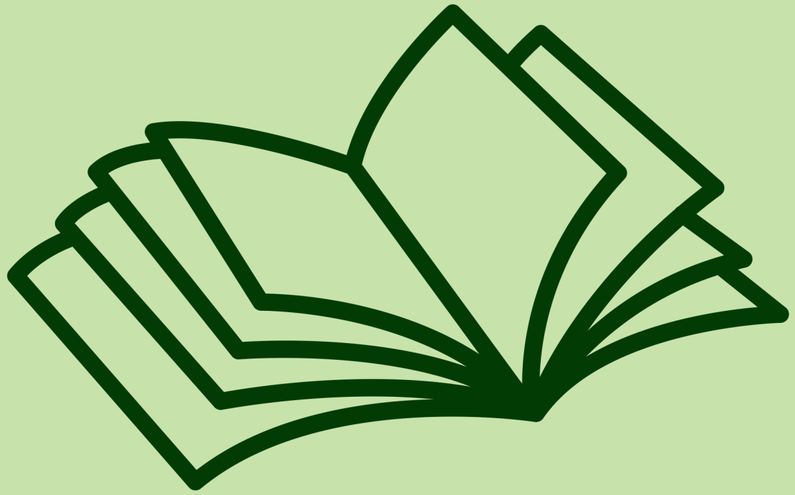
domancalkinsa@sherwoodoregon.gov

Sherwood Public Library

Let’s take a break before the next section.



Collection Development & Requests for Reconsideration Policies



What we'll cover in this section

- Intellectual Freedom
- Deschutes Public Library's story
- Roseburg School District's story
- Impact to the Community
- Book Challenges
- Library Bill of Rights & First Amendment
- Collection Development policy
- Requests for Reconsideration policies

What is Intellectual Freedom?

- Freedom to hold, receive, and disseminate ideas without restriction.
- Protects an individual's right to access, explore, and express ideas and information.
- Basis for a self-governing, well-informed citizenry.
- Integral to a democratic society.

Why does it matter?

Deschutes Public Library's story

Roseburg School District’s story

Impact to the Community

“Quiet, or soft censorship, can be defined as not purchasing materials because of personal reservations, rather than a professional evaluation of the need for them. It is not purchasing materials, weeding, or restricting access as a way to avoid controversy.”

--Judy Ehrenstien

What is at risk

- Fear guides decisions
- Lack of diversity
- Fewer inclusive titles
- Fewer publishers taking on material that might be challenged
- Authors altering their lens
- Library patrons suffer

Avoid Censorship.
Avoid Lawsuits.

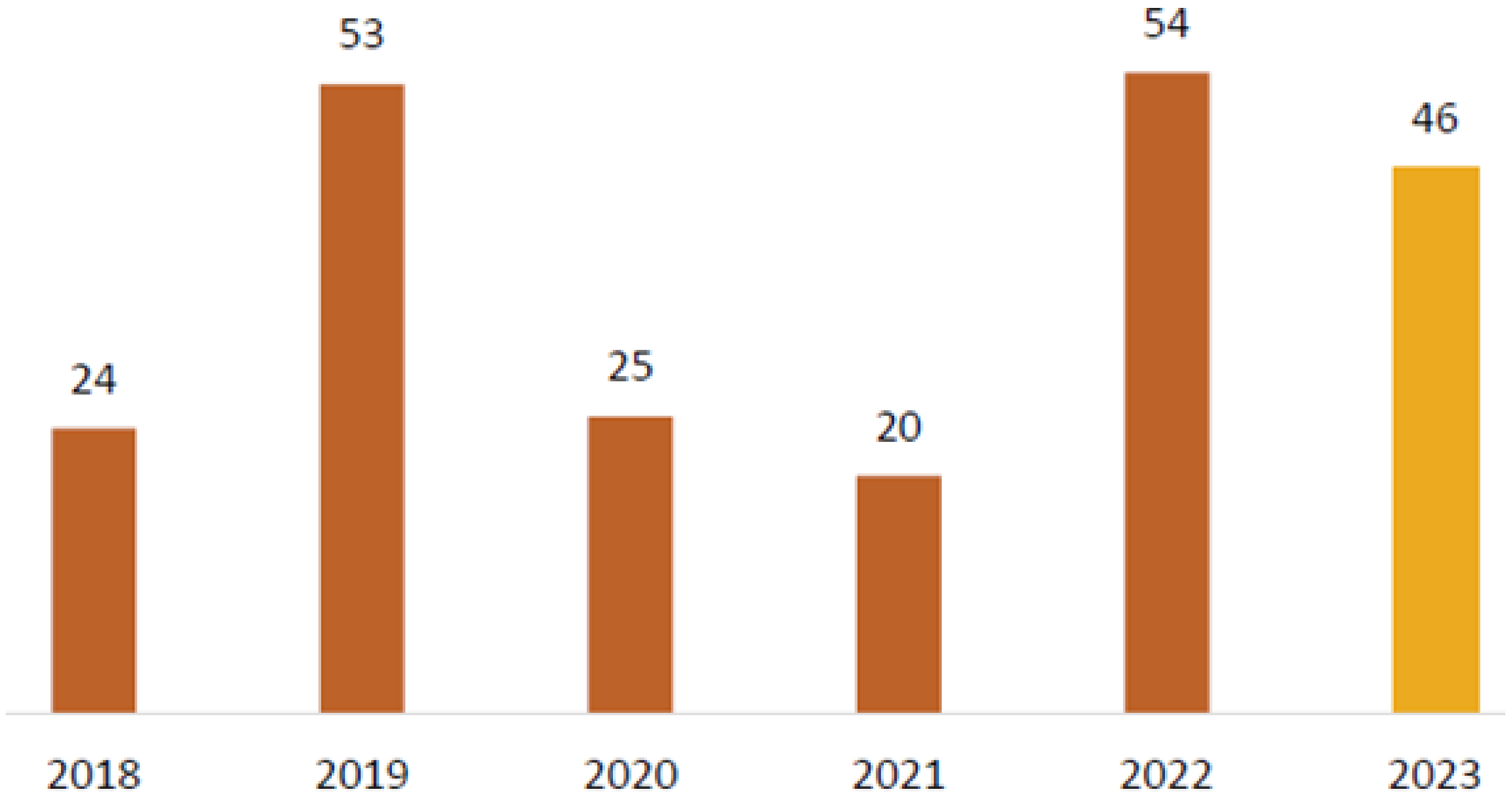
Active lawsuits to know about

- Freedom to Read Foundation Files Amicus Brief in Support of Llano County Texans' Lawsuit Challenging County's Library Book Censorship
- Freedom to Read Foundation Joins Coalition of Publishers, Booksellers, Librarians and Readers in Filing Suit to Defend Arkansas Citizens' Right to Read
- PEN America, Penguin Random House Sue Florida School District Over 'Unconstitutional' Book Bans
- ACLU, Missouri library groups sue over new school book law
- ACLU of Wisconsin Files Free Speech Lawsuit Over School's Censorship of Gay-Themed Books
- ACLU Texas Files OCR Complaint Over a District's Anti-Trans Book Ban
- Five Publishers Join Lawsuit to Stop Iowa Book Banning Law

Oregon Challenge Stats, 2023

- 45 individual challenges reported
- 93 titles challenged

OR Challenge Incident Reports



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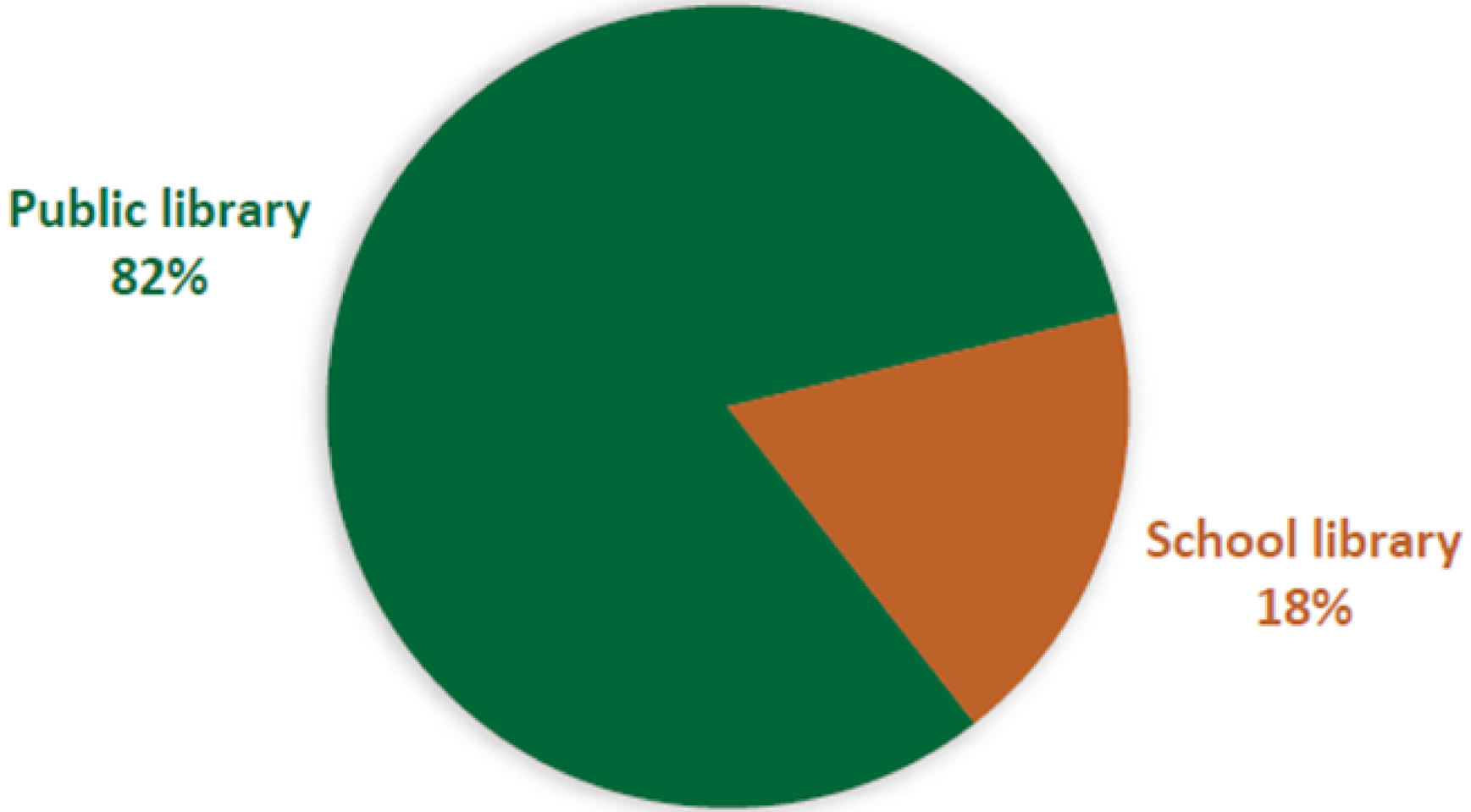


Current Events:

Can you name any recent incidents of censorship or book banning?

- In your area or neighboring areas?
- In Oregon (in general)?
- In other areas of the United States?
- Quick question: which state has the most book bans?

United Against Book Bans 2023 data

A record 4,240 unique book titles were targeted for censorship in 2023, a 65% increase over the 2,571 unique titles targeted in 2022 and a staggering 128% increase over 2021 numbers.

47% of the books targeted for censorship were titles representing the voices and lived experiences of LGBTQIA+ and BIPOC individuals.

Unique titles targeted in 2022

Unique titles targeted in 2023

In 2023, the number of titles targeted for censorship at public libraries increased by 92% over the previous year, while school libraries saw an 11% increase.
Unite Against Book Bans

Answer to which state has banned the most books:

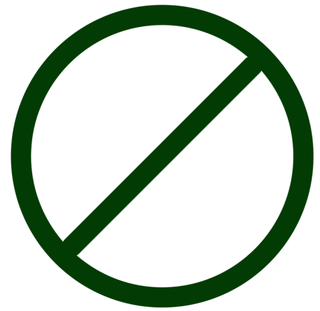
F L O R I D A

Library Bill of Rights

- Materials provided to all
- Materials represent all points of view
- Challenge censorship
- Open to all people
- Meeting rooms and exhibit spaces available to all, equally
- Privacy and confidentiality of patron information

Aren’t there some kinds of expression that really should be censored?

Restrictions based on the First Amendment



- Obscenity (Miller Test)
- Child Pornography
- Defamation / slander
- “Fighting words”
- National Security
- False advertising

Purpose of a Collection Development Policy

- Process of systematically building the collection of a particular library.
- Defines the objective standards regarding what and how to acquire for the library.

Let’s look at examples.

Example: Deschutes Public Library

Within CD Policy:

Deschutes Public Library supports the undeniable right of all individuals to access information that represents a full range of ideas, opinions, concepts, topics, and thoughts, regardless of that individual's background including but not limited to the federal protected classes: race, color, religion, sex (including pregnancy, sexual orientation, and/or gender identity), national origin, age, disability, and genetic information.

Within Reconsideration Process:

Materials will not be excluded because of the origin, background, or views of those contributing to their creation. Creators or content by or about Federal protected classes: race, color, religion, sex (including pregnancy, sexual orientation, and/or gender identity), national origin, age, disability, and genetic information will be protected in accordance with state and national anti-discrimination laws.

Example: Deschutes Public Library

Each type of material and/or format will be considered in terms of its own merit and intended audience. Individual items shall be judged as whole works and not solely based on random or selected parts. All selections, whether purchases, monetary donations, or physical gifts, must meet applicable criteria from the following:

1. Relationship to interests of the community.
2. Lasting value.
3. Vitality and originality of thought.
4. Content by or about historically marginalized groups or communities.
5. Contemporary significance.
6. Artistic excellence.
7. Entertaining presentation.
8. Scientific significance and objectivity.
9. Suitability and currency of format for library use.
10. Relationship to existing library materials to maintain balanced collections.
11. Value for the expenditure.
12. Availability of space.

RESPONSIBILITY FOR SELECTION

Ultimate responsibility for materials selection rests with the Library Director, who administers procedures designed to achieve the results directed by the Library Board's policies. The Library Director may delegate authority to interpret and guide the application of this administrative rule in making decisions relevant to managing the collections.

Example: Roseburg School District

It is the responsibility of all libraries to serve every member of their designated communities. It is not the responsibility of a library to promote one point of view over another. Materials collected will represent majority as well as minority beliefs.

Selection Criteria:

Items selected will:

- Represent differing viewpoints on controversial issues.
- Provide a global perspective and promote diversity by including materials by authors and illustrators of all cultures.
- Include a variety of resources in physical and virtual formats including print and non-print such as electronic and multimedia (including subscription academic databases, eBooks, and other forms of emerging technology).
- Incorporate accurate and factual information from authoritative sources.
- Promote diversity in items offered in: subject area, age, emotional development, ability level, access, learning styles, social, emotional, and intellectual development.
- Researched for favorable reviews from diverse perspectives, favorable recommendations, award winners and nominees, and titles popular for school population.
- Reflect students' personal interests and learning.
- Evolve as the student population changes in needs and trends.

Responsibility for Selection:

- Responsibility for selection rests with professionally trained library personnel using the established Selection Criteria (see below).
- Educators, students, administrators, and others may participate by making recommendations or requests. However, final responsibility for the selection decisions rests with school library professionals.

Definitions: Request for Reconsideration of Library Materials [Process]

Request for Reconsideration:

- A part of the Collection Development Policy the describes the process for reconsideration of a title.
- Describes how to ask for a review of a title
- Often called a “challenge” form or process
- A step by step process / procedure for responding to requests for reconsideration.
- Often include:
  - Rules for who can submit forms
  - Describes a systematic process for review
  - Assigns final responsibility for decisions
  - Describes an appeal process

Example: Roseburg School District

Material Reconsideration:

- Complainants must have read (or viewed, in the case of visual media) the entire work to which they object.
- A questioned item will be considered in its entirety, not judged solely on portions taken out of context.
- Only one Formal Reconsideration Form will suffice for review. Multiples, or those issued as part of an organized campaign or group, are not necessary. The first Formal Reconsideration Form filed by date will be considered the Primary Complainant.
- Lists of books will not be considered for review.
- When library resources are reconsidered, the principles of the freedom to read, listen, and view are defended rather than specific materials.
- Parents or guardians have the right to guide the reading, viewing, and listening of their children but must give the same right to other parents/guardians. Parents must use the Formal Request for Parental Restrictions Placed on Library Accounts and deliver to the school office or library.

Reconsideration Process:

- The Reconsideration Committee will remain anonymous and include teachers, administrators, school specialists, a parent, and, at the high school level, a student aged 17 or older.
- The librarian will provide the reviewing committee with a short Intellectual Freedom training that explains the the Selection Process, the Reconsideration Process, the Formal Request for Parental Restrictions Placed on Library Accounts, the Library Bill of Rights, and the Freedom to Read Statement of the American Library Association.
- The training will also include a list of awards or accolades the material has received, a selection of reviews, and/or any applicable matter to assist in research.
- The committee's written decision shall be final and presented to the Primary Complainant and the superintendent within five days after a decision has been made by a site administrator.
- The committee will annually review any item selected for removal to determine if the original directive for removal continues to be warranted.

Example: Roseburg School District Parental Restrictions Placed on Library Accounts

Individuals submitting requests must sign and confirm that they understand:

- That every effort will be made to honor this request for student library account restriction(s).
- Human opinion is subjective and what may be considered offensive by one person may not necessarily be considered offensive by another.
- Library and school staff will not be held responsible for any unknown, or unforeseeable, projected offense a reader may encounter.
- Library and school staff cannot honor requests that appear to be based on prejudice of an individual, group of individuals, religion, or any exclusion that would violate state law.
- That every library patron has the right to stop reading, and return, any library material, for any reason, at any time.

Purpose of a Request for Reconsideration Policy

- Describes the process for reconsideration of a title.
- Describes how to ask for a review.
- Includes the step-by-step process for responding to requests for reconsideration.

Oregon School Boards Assoc.

Sample Policy on Instructional Materials

Green flags in OSBA policy

- Something is better than nothing
- Must be in writing.
- Timeline.
- Rotating terms.

Red flags is OSBA policy

- Does not mention libraries.
- Last updated in 2017.
- Lengthy and complicated.
- Override is problematic.

Sample Request for Reconsideration forms

Updates we recommend for a Reconsideration Process.

- Establish criteria to be eligible to file a complaint (“Injury in fact”, causation, and redressability).
- Establish reasonable scope (how many at a time?).
- Establish reasonable jeopardy protection to avoid retrials and harassment.

Sample Eligibility Statement

Persons wishing to request a review of library materials must adhere to the following:

1. The individual must be a registered library resident cardholder.
2. Groups or organizations may not submit a request.
3. Each form can only be used for a single title at a time.
4. A maximum of one request per month per person.
5. Materials reviewed and retained are not eligible for reconsideration for 3 years.

Sample Miller Test clause

Did you read/view/listen to the entire material? ☐ Yes ☐ No

IF NO, what percentage did you read/view?
☐ Only the passages/sections in question ☐ Less than 25%
☐ about 50% ☐ About 75% ☐ More than 75%

Sample Demonstrable Harm

Do you believe this material violates library collection development policy or federal, state, or local statute?
☐ Yes ☐ No ☐ Unsure
IF YES, please cite the specific policy element or statute.

How has reading or viewing this material caused you, or one of your children, personal or financial harm?

Sample Causation / self-selection statement

What prompted you to look at and/or borrow the material from the library?

Do you attest that you read/viewed/or listened to this material voluntarily and not due to coercion from library staff?

☐ Yes ☐ No

IF NO, please describe.

Sample Public Records Acknowledgement

BY SIGNING, I ATTEST that I am the petitioner and the responses provided above are true as I verily believe. I understand that

- Anonymous or unsigned requests will not be considered.
- Upon submission, this form is a public record and my name may be disclosed.
- The library will keep contact information confidential from the general public to the greatest extent allowed by law.
- The library may report this request for review to organizations that gather information about such challenges. My personally identifiable information will not be included.

Signature (required). Date

Let’s talk about protecting against the 5 types of censorship.

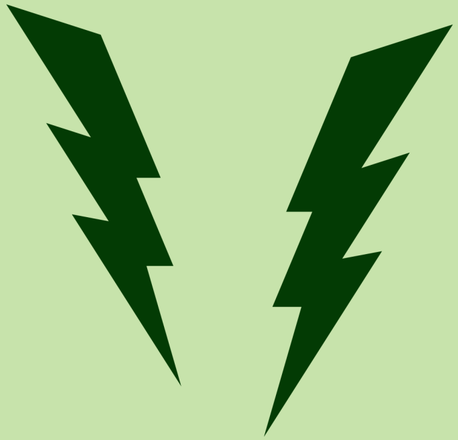
Types of Censorship

5 R's

- Restriction
- Redaction
- Relocation
- Re-label
- Removal

Even more policies for Intellectual Freedom.

The lightening round.



Think Outside of the Book

- Displays
- Databases
- E-books & audiobooks
- Programming
- Meeting Room

Displays

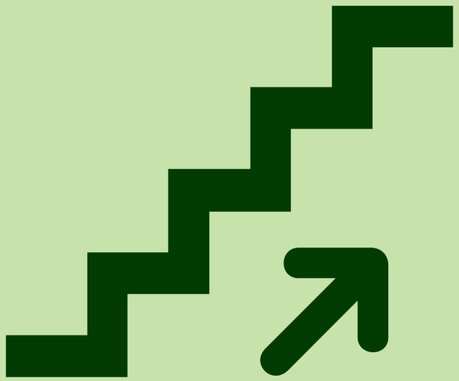
Databases

E-books & audiobooks

Programming

Meeting Rooms

Oregon Examples - Times things went right!



- Roseburg School District
- West Linn
- Both

Oregon Examples - Times things went wrong

- Graphic Novel removed from North Medford High School
- Canby School District removed Lolita
- IFC Statement to Canby

PARENTS DEFENDING
SCHOOLS AND LIBRARIES

Do you have an example to share?

Look at your Action Plan...

- What resonated the most?
- Is there a policy you feel the need to update? Why? Which parts?
- How will you improve your policy?
- Are there phrases or resources to capture now?

Follow your policy in full 100% of the time.

IF Toolkit https://libguides.osl.state.or.us/iftoolkit/home

Closing thoughts

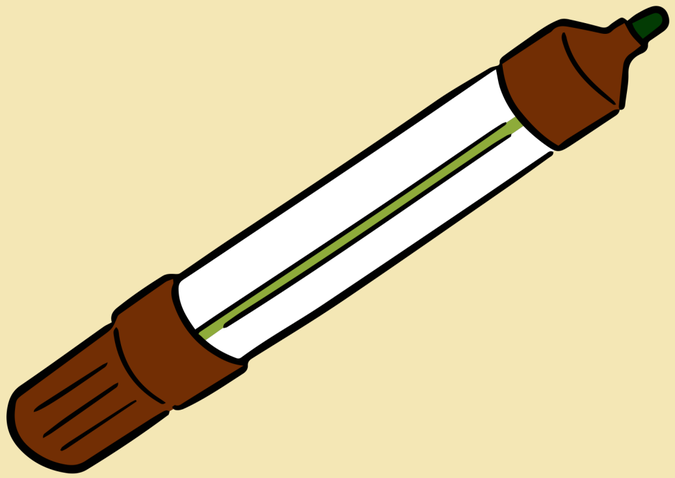
Questions on this section?

Emily O'Neal
emilyo@dpls.lib.or.us
Deschutes Public Library

Marie Felgentrager
mfelgentrager@roseburg.k12.or.us
Roseburg Public Schools

Hands-on Activity Time!

Scenarios



or

Public Library Scenarios

Rules of Use / Behavior Policy Scenarios

School Library Scenarios

Your Policy Action Plan

ACTION!

We’re nearly done.

Closing thoughts & questions

We’re here for you.

Contact us

Emily O’Neal
emilyo@dpls.lib.or.us

Lizbeth Chavez Villasenor
lsauervillasenor@beavertonoregon.gov

Marie Felgentrager
mfelgentrager@roseburg.k12.or.us

Adrienne Doman Calkins
domancalkinsa@sherwoodoregon.gov