

Policies: Or, Can You Put That in Writing?

We like to think of libraries as peaceful, quiet places where people are always nice to each other. Much of the time this is true. There are times, however, when libraries are not so quiet. In fact, sometimes libraries can become downright controversial.

For example, sometimes there are people who do not like some of the books or other materials that a library makes available to the community. Or an employee may feel that she has been treated unfairly. Or somebody's behavior disturbs other patrons. Or someone claims that his books have been returned, although the library's records show that they are still checked out.

What do you do in these situations?

One method of library management is to make up rules as you go along. Each situation is handled as the staff sees fit, with little or no guidance from the library board. This may work for a while, but it will not end happily.

For one thing, the system is arbitrary. What the library director decides to do may be based on his current mood or on her previous experiences with the customer in question. And library staff members will naturally like some people more than others. They may treat some library users more leniently than others. Even if every staff member treats every customer the same, without written guidelines from the board, there may be a perception of unfairness. This problem is magnified when different people are handling the same problem at different times. Different staff members bring their own standards and methods of problem solving to the job.

Secondly, if there are no written policies, the staff is unprotected. The director may make a good decision, but the board may not agree with it. Such second guessing may diminish the director's authority in the eyes of the public, and it can lead to strained relations between the staff and the board. In extreme cases, it may even leave the staff legally exposed without board support.

Thirdly, written policies add extra authority to the staff when a confrontation occurs. Most library users tend to believe things when they are written down. (They are readers, after all.) So, when a question arises, the staff's ability to show the patron the policy in black and white can often be very helpful.

Written policies, then, are an invaluable library management tool. What kind of policies should you have? At a minimum, your library should have the following policies:

A Human Resources Policy which includes job descriptions and information on general job expectations, salaries and job benefits, and performance evaluation.

A Collection Development and Management Policy which outlines the kinds of materials that will be selected, who will do the selection, what criteria will be used in selection, how donated materials will be handled, weeding procedures, and how the library will respond to complaints about its materials.

Operational Policies that give conditions for using the library, including who qualifies for a prepaid library card and how others can go about purchasing a nonresident card. They set expectations for the behavior of the library's customers. They may also set special conditions for the use of library resources. For example, public libraries in Idaho are required to have an [Internet use policy](#).

Special Policies deal with recurring problems that may be unique to your own library. For example, if you have a meeting room, you should have a policy on who can use it, and how it is to be scheduled.

The Policy Manual

If you are a new public library director, how can you find out about your library's policies?

First, ask the board or other staff members for a copy of the library's policy manual. A policy manual is a book in which all of the library's policies are compiled for easy reference. If no one knows where it is, look around to see if you can find it. It usually be kept at the director's work desk or at the circulation desk. If such a policy manual exists, read the policies. Your library's policies may also be available online. If your predecessor was thoughtful enough to leave you a [Transition Notebook](#), it should contain copies of the library's current policies as well.

Check the date when each policy was established. If policies are old, check to see if they represent the way things are actually done in your library. If the policy manual exists, and it accurately portrays the way things are done, you are all set. The only thing you will need to do is an annual review of your library's policies with your board to see if any changes need to be made and to develop new policies as circumstances require

them. You will also find that some policies eventually need to be retired. If you cannot find a policy manual in the library, check with the former director or the board president to see if such a manual exists. If it does, get a copy for your own use, and check the policies as outlined above. There is more information about specific policies in the [Transition Notebook](#).

If a policy notebook does not exist, you will need to compile one. You may be able to find some individual policies that have not been collected. Check the board minutes for the past five years. Some policies may appear there, although they might have to be rewritten a bit. Making your library's policies available on the library website in PDF format makes them easy to find and print and difficult to misplace.

In general, a policy statement should include:

- a concise title,
- a statement of purpose,
- a detailed description of the policy,
- the state the policy was originally approved by the library board,
- the dates the policy was reviewed and revised.

Any policy that you rewrite from board minutes should be reviewed by the board to make sure that it accurately reflect their original intent.

Once you have collected the policies you already have, you may find that there are some gaps. If you need to write some new policies, you will want to call your Area Field Consultant at the Idaho Commission for Libraries for help.

Developing a policy manual may take quite a bit of time, but in the long run it will also save a lot of time. If you need to develop a number of different policies, do it over several months, and present policies to the board one at a time, so that they will have adequate time to think about and respond to each one. It is also good to present different policy options so that the board may choose the one that they feel will work best. When options are presented, advantages and disadvantages in terms of staff time, finances, space, and other management considerations should also be given.

Remember, too, that policies are the outline on which your library's services are based. They are also legal documents, public records, and ultimately the board's responsibility. It is important that you, your staff, and your board understand them and follow them.