

Procedures: *Or, Where's the Light Switch?*

Planning is an important part of the work of library directors and library boards. With limited resources, it is important that your library use what it has in a strategic, systematic manner. Unplanned changes usually cost more in time and money than changes that are thought out in advance.

A brand new director walked into her one-person library for the first time. She had worked in libraries before. She had highly developed library skills. The library board had been lucky to find such a qualified person. They had given her a key and a policy manual. She arrived early enough to open the library with plenty of time to spare. Unfortunately, no one had thought to tell her where the light switches were located. She looked around as best she could in the dark. Then she tried the telephone, which shared one of several lines with city hall. City hall was closed. She could not get an outside line. Because of the mountains, there was no cell reception.

The new director, whose first day on the job started with every good intention, had to return home to use her land line to call the board president. Unfortunately, the board president did not know where the library's light switches were located. Two hours later, a city employee was found who knew how to turn on the lights. The library was two and a half hours late in opening. It was not an auspicious start for a new library director.

Whether we like it or not, public libraries, like all organizations, are dependent on routine. We keep regularly scheduled hours; we shelves books consistently in the same manner; we use the same procedures to check out materials and check them back in; we catalog materials using the same system, day in and day out. If we did not follow these routines, our libraries would be disorganized, no one could ever find anything, and our customers would never know what to expect from us.

Policy versus Procedure

An important component of keeping the library running smoothly and consistently is the ability to develop good procedures. **While *policies are philosophical statements that explain in general terms what we do and why we do it, procedures are the practical statements that explain how we get it done.***

Procedures, the steps for accomplishing the policy, are usually developed over time. Once they are established, they are changed only when there is some compelling reason

to do so. As long as procedures do not interfere with policy matters, they are the province of the staff. Unlike policy, procedures do not need to be acted on by the board.

The Procedure Manual

Procedures should be written down. Details, such as the location of important equipment, should be included in a procedure description. *(Imagine how different the story that began this section would have been, if the new director had had a procedure manual describing where the light switches were located!)*

Procedure manuals do not have to be great works of art. They can be written in an outline format, step-by-step with only the most basic information.

What procedures should be included in a procedure manual? Certainly, any routines that occur daily, weekly, or monthly should be covered. These would include:

- Procedures for opening and closing the library,
- How to create or renew a library card,
- How to make and charge for a nonresident library card,
- How to assign a public computer,
- Circulation procedures: checking out, checking in, placing holds, and dealing with overdue fines,
- Interlibrary loan procedures
- Procedures for ordering materials,
- Procedures for receiving new materials (including newspapers and magazines),
- Technical processing procedures,
- Procedures for collecting statistics and running reports,
- Procedures for setting up regular and special board meetings (this should also be in the board's bylaws),
- Procedures for special events, such as story hour or programs for adults,
- Procedures for reserving the meeting room(s),

- Procedures for handling challenges to library materials,
- Procedures for responding to requests for public information,
- Procedures for requests for information from law enforcement agencies.

If any of your library's procedures require special forms, copies of the forms should be included in the procedure manual.

The procedure manual should contain emergency procedures and telephone numbers. It should tell what to do in case of a break-in, a medical emergency, and a fire, for example.

In addition to routine activities, the procedure manual should include a calendar that shows procedures that must be carried out each year. Such annual procedures might be:

- Budget preparation,
- Election routines (for district libraries),
- Summer Reading Program (SRP),
- Annual reports,
- The E-rate cycle (if your library participates in that program)

As with the policy manual, the first thing is to discover if a procedure manual exists. If it does, then all you have to do is make sure it is accurate and complete. If it is not accurate or complete, or if no procedure manual exists, you will need to develop and document the procedures.

Who should write the procedure manual? The person who is primarily responsible for any given routine should write the description of the procedure. Remember, this can be done in an outline format. It does not have to be great literature. In larger libraries, it is a good practice to have a procedure manual for each department, although a master manual containing all procedures should be kept by the director. Where a large number of procedures will be written by a single person, space the writing out over several months. The procedure manual should be reviewed annually to make sure it still reflects accurately how routines are really done.

New employees should be provided with a description of all procedures for which they will be responsible. Then they should be able to find the light switch their first day on the job!