THE PUBLIC LIBRARY DIRECTOR'S TOOLKIT

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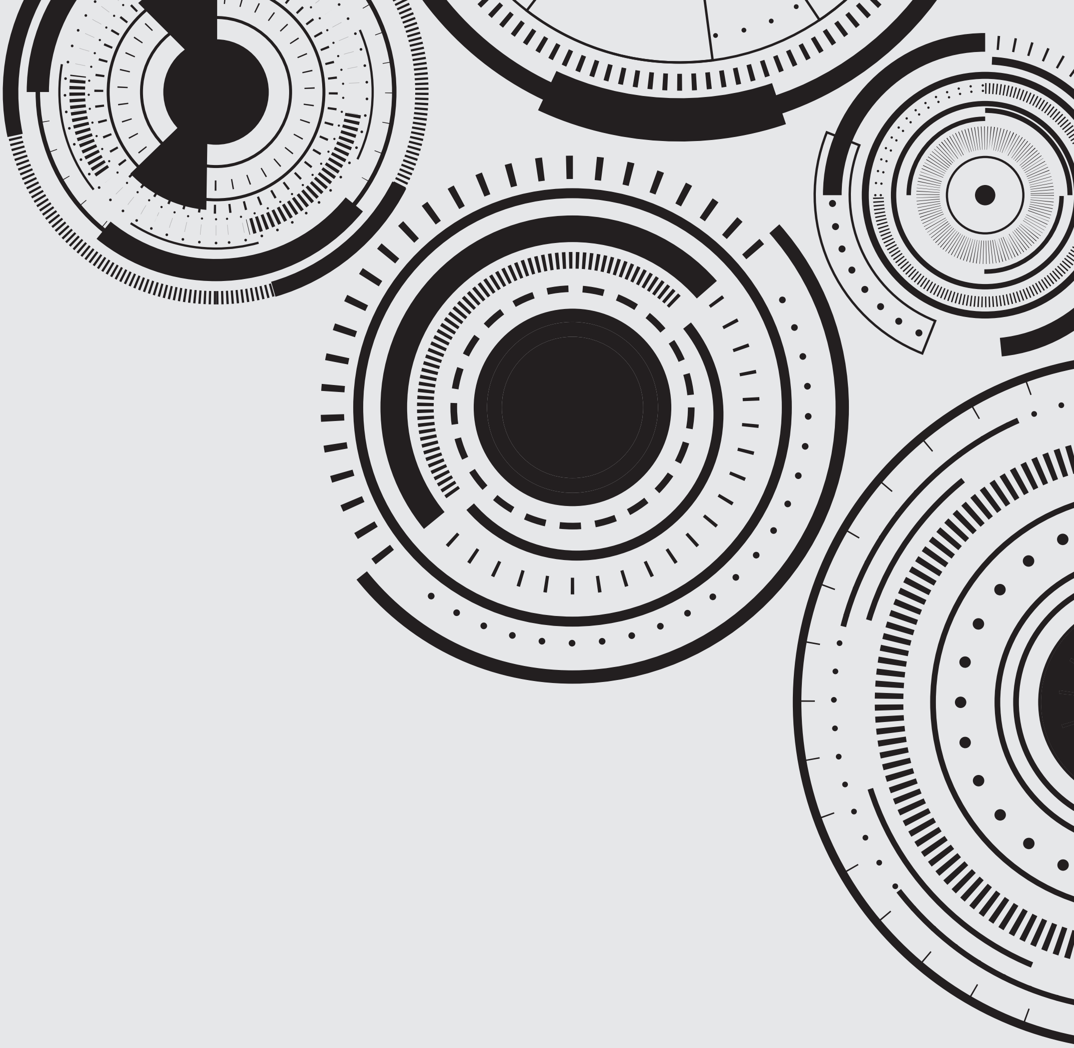
INTRODUCTION

RUNNING A LIBRARY is a big task, with many moving parts. Staff, patrons, boards, community meetings, legal and financial requirements, professional demands—where do you go for help?

When we started out as library directors, there was so much we didn't know. We learned by trial and error, calling on our colleagues, attorneys, and other professionals more times than we could count—because there was no one source to answer all our questions. That is why we are writing this book. We do not want future librarians, management staff and trustees to be as bewildered as we were when we became public library directors. We love libraries and want to see them succeed. In order to do that, directors need to have certain tools in their toolkit. We want to provide those tools and help you come up with your own toolkit that you can use as a library director.

As with any administrative-level position, it will take about a year to learn the basic responsibilities. We will take you through the core components of what you need to know, help you skip some of the pain points that we both went through, and provide resources that you can use in your work. The book is divided into two parts: part I gives you an overview of the basic responsibilities of being a public library director, and part II provides sample documents and forms that you can use immediately.

Let the journey begin.



PART I

DIRECTOR TOOLBOX

1

GETTING STARTED

After reading this chapter, you will know the following:

- What the basic responsibilities for being a public library director are
- How to set yourself up for success your first day, week, month, and year
- How to gather the information you need to be successful
- How to put together a communication strategy
- How to set up systems to maintain harmony between work and your personal life

Starting a new job is exhilarating, but it can also be daunting. Starting as a director only intensifies those feelings. Starting at a new library as director means you are supposed to take charge, but you don't necessarily know all the processes and past history on how things have been handled at this library. We will go through the steps you can take to set yourself up for success from day one.

CORE RESPONSIBILITIES

What exactly are your responsibilities? Depending on the size of library you work in, this could mean anything from making sure the doors are unlocked at opening to overseeing managers who have staff who carry out the core functions of the library. You may actively perform the following duties or oversee other staff who perform them, but, ultimately, the buck stops with you, so you want to be aware of what is going on in your building.

PERSONNEL

You are ultimately responsible for the hiring, training, supervision, evaluation, and, if necessary, termination of all the employees at the library. Depending on your library's size, you may do all of these tasks yourself, have managers who hire their own staff, or perhaps even have an HR (human resources) manager or department that does the hiring.

BOARD OF TRUSTEES

The library director reports to the board, and thus should cultivate a good working relationship with board members, but is also responsible for ensuring the board is educated on the library's finances, its strategic plan, and the programs and services the library provides. You are in charge of creating the monthly board packet and delivering information to your board.

FINANCES

Preparing the budget for the board's review and approval is one of your key functions. This includes planning ahead to ensure that you have enough money for building repairs, staff raises, and technology improvements as well as presenting monthly reports to the board about the library's finances. You are responsible for making sure the budget is being spent appropriately and for creating the monthly financial statements. Sometimes this means you are actually running the report, but you may instead have a business manager or outside accounting firm that prepares the statements and creates the checks for you.

LEGAL MATTERS

Any legal concerns will go through the director. Legal matters can include working with the attorney to draft new policies, review contracts, or handle personnel issues. The library director should be the main point of contact for the library attorney and is in charge of ensuring the library is complying with all applicable laws.

POLICIES AND PROCEDURES

Having strong policies and procedures helps create a well-run library. While the board approves policies, the library director is responsible for crafting the policies and procedures that help run the library.

INSURANCE

There are many types of insurance, which is covered in more detail in chapter 7. The director manages the insurance the library provides and ensures the library building and staff are adequately covered.

BUILDING MAINTENANCE

The physical maintenance of your building is also up to you. Depending on the size of your building and your type of library, this could mean different things. Some libraries may have paid maintenance staff, or the director may be the maintenance staff. However maintenance is handled in your library, the director has to be aware of all aspects of the building so that informed decisions can be made when necessary.

EMERGENCY PLANNING

As director, not only do you handle the day-to-day emergencies that pop up at a library, but you also must prepare for larger emergencies. Creating an emergency plan and ensuring staff are trained to react appropriately to emergencies is an essential piece of the director's job.

COLLECTION DEVELOPMENT

Depending on the size of the library and staff, the director may or may not be the person doing collection development. Either way, the director is ultimately responsible for making sure that the library collection is current, sufficient, and representative of the community's wants and needs. This means making sure there is sufficient funding for new materials, evaluating new types of items to add to the collection, and ensuring that weeding is happening on a regular basis.

PROGRAMMING AND SERVICES

As the director, you are ultimately responsible for making sure that the library is offering a diverse range of programs and services to meet the wants and needs of the community. You also need to determine what services the library may want to provide. In order to find out what your community wants, they need to be queried.

COMMUNITY ENGAGEMENT

You should attend community outreach events and be active in local organizations like Rotary, Kiwanis, Lions, and so forth. By being active and getting to know the community, you can better advocate for the role of the library in that community.

TECHNOLOGY

Taking care of the facility means ensuring you have appropriate technologies in place for staff and patrons. Ensuring that you have the technology your community needs and planning for future costs are responsibilities of the director. You will also need to set and enforce technology competencies for staff and stay up-to-date on technology issues and trends.

STRATEGIC PLAN

In order to know why you do what you do, you need to have a clear mission and vision. The board sets the strategic plan, but it is the director's job to carry out the directives of that plan.

YOUR FIRST YEAR

Now that you know your responsibilities, how do you do the job?

FIRST DAY

First, prep yourself. Read the board minutes and board packets, if you have access to them, and the library policies, personnel policies, and any other recent information you can obtain about the library, including recent news articles, online reviews, and so on, before your first day. Ideally, this was part of your interview preparation, but if not, do it now. This will give you an idea of what issues you might be facing in your first few days, weeks, and months at your library. Focus on reading policies that you might have to use right away, like the patron behavior policy or unattended children policy. Make a list of all the things that you think you will need to learn. You will need to become your own trainer. Check out part II, "Tools," for a recommended list of training topics to help you get started.

Second, admit when you don't know something and ask for background information for clarification. Not knowing everything when you start a job is to be expected. Asking for help will enable you to gather as much information as possible to help you make better decisions for the library. It also shows your staff that even the boss needs to ask for help sometimes, and it is healthy to do so. Depending on library size, you might have an administrative team or it might be just you and one or two other people. Go to the administrative or management team to gain background on issues or topics as they arise. If yours is a smaller library, you can ask the other staff members for information. Asking your board president for information can also be useful, depending on the relationship the board had with the previous director.

FIRST WEEK

After you make it through your first day, you can focus on your first week. You aren't expected to have everything down pat, and you will have some flexibility in your schedule. Use this freedom to your advantage to gain insight into your library's workings.

Tour the library each day and look at it through the eyes of a patron. Note the things that work well. Then turn your focus to areas that you would like to eventually change:

- What strikes you as discordant or odd in the layout, workflow, or signage?
- What procedures and processes seem to be cumbersome or unfriendly?
- Are there any workflows, procedures, or processes that could be adjusted?

While you are still new to the library, you are able to see the library in a different light. Keep a file on what changes you think need to be made in the future to make the library more accessible for the community and for staff. Share with staff what you see as working well so you are not just focusing on all the things you want to change. For the moment, just jot down what you want to change; don't actually make the changes. Give yourself time to learn about the library and community before committing to any changes.

The first week is also a good time to start to get to know your direct reports. Schedule one-on-one sessions with each of your managers to get to know them a little better. Have a set of questions that you ask each one so that you can get a well-rounded picture of the people in your library. You may not be able to meet with everyone in the first week, but getting a few such meetings under your belt will set you up for success in the long run. Here are some suggestions for questions you can ask your managers:

- What is your background?
- What are you passionate about?
- What current projects are you and/or your department working on?
- What do you wish you could do individually, as a department, or for the entire library?
- Do you have anything you would like to see changed or anything you have an issue with?
- How do you prefer to communicate (phone, e-mail, face-to-face)?
- What are the biggest challenges the library is facing (or will face in the near future)?
- Why is the library going to face these challenges?
- What are the most promising unexploited opportunities for improvement?
- What would need to happen for the library to exploit the potential of these opportunities?
- If you were leading the library, on what would you focus your attention?

Next, set up some meet-and-greets with the remainder of the staff. If you have a smaller staff, meeting with them one-on-one would be great. If your staff is larger, this may be more difficult. You can use some of the questions that you asked your managers to dig into what motivates staff as well as uncover issues that you may need to address, areas for improvement, and sources of staff pride.

When you are not meeting with people or touring the library, take time to set yourself up for success in your work environment. Ask yourself these questions to help you create an environment that will work best for you:

- What tools and supplies do I need to help me be successful and stay on top of my to-do list?
- What setup do I need to have to work at peak efficiency? (Where should my computer go? My desk? Visitor's chair? File cabinet?)
- What kind of environment do I want to create in my office? (Will I hang pictures on the wall? Will I have any personal items in my office?)
- What message do I want to send to staff, vendors, board members, and others about the type of director I am based on how my office appears?

TAKE A BREAK

Don't forget to take breaks! In 2011, a study at the University of Illinois at Urbana–Champaign found that even brief breaks from a task can dramatically improve your ability to focus on that task for prolonged periods.*

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*Atsunori Ariga and Alejandro Lleras, "Brief and Rare Mental 'Breaks' Keep You Focused: Deactivation and Reactivation of Task Goals Preempt Vigilance Decrements." Cognition 118, no. 3 (March 2011): 439–43, doi:10.1016/j.cognition.2010.12.007.

Your workspace conveys in a glance what you are about so you want to make sure it reflects you at your best.

The first week can be exhausting. Not only are you meeting with many new people; you are also trying to absorb significant amounts of information on policies, procedures, and millions of other pieces of data you are gathering. Don't feel that you have to learn everything in a week. When you go home at night, rest and do something unrelated to the library. This allows you a chance to process all the information you have received that day.

FIRST MONTH

In your first week, you hopefully set up some times to meet with your managers and staff. But chances are you did not get all of that done in that one week. Use the rest of the month to meet with those people and also with other key people in the community. Go to the village/city hall, schools, park district, chamber of commerce, and so forth, and introduce yourself. Take time to meet with each board member one-on-one, if you can, and ask them about their vision for the library and the future. Hopefully, your library will have a strategic plan that will help guide you on where the library is headed. If not, turn to chapter 11 for information on how to craft a strategic plan for your library.

One critical activity to do during your first month is to walk around your library every day to say hello to people and chat for a few minutes with staff and patrons. Not only will this help you learn the flow of your library and become familiar with the building itself; it will also give people a chance to know you. Building relationships early on will help you understand what motivates people and give you a better sense of your community's interests and your staff's skills and abilities. This knowledge will help you down the road when it comes time to assign people to projects or to help get buy-in on new initiatives.

One of the main components of setting yourself up for future success is to develop a communication strategy. Creating a plan during your first month will help set the tone for how you share information with the staff, board, and community. Ask yourself these questions:

- What is my vision for a great library? How will I convey that to staff and the board?
- What processes do I want to put in place to communicate with staff and with the board?
- How often should I communicate with staff? How will I convey general information in addition to larger project information?
- How often does the board expect updates and reports? How do board members prefer to receive that type of information?

Set up a schedule that delineates how, when, and what you will communicate with staff. This might mean weekly meetings with managers, quarterly all-staff meetings, and/or monthly e-mails reporting on what is going on in the library. What, when, and how you choose to communicate will depend on the size and culture of your library. Figuring out a plan now will ensure that you don't lose track of time and find yourself a year into the job with staff telling you that they never know what is going on in the library.

You should also set up a plan to communicate with board members, based on their preferences. Some boards may be fine with the monthly director's report in the board packet along with the occasional e-mail when an important issue arises, and other boards might prefer more frequent communication. Discuss what types of information board members prefer and how often they expect to receive it from you.

During your first month, you will also have your first board meeting. Hopefully, you attended some of the board meetings before you became director or attended them at your previous library. If not, don't worry. The hardest part of the monthly board meeting is not the meeting, but the preparation of the board packet for the meeting. With luck, the library has an assistant director, business manager, or administrative assistant to help you through this process. If not, contact a colleague to ask how to put together the packet or, at the very least, look at the previous packets to see what is normally included. That first board meeting is an excellent opportunity to query the board members about their preferred method and frequency of communication. Start by working with the board president to draft agenda items. Then, look at what the board discussed during that month in previous years. Learn more about putting together a board packet in chapter 3, where you can also check out a timeline for typical board meeting agenda items.

For the first few months, don't make any dramatic changes to the agenda, reports, or statistics. Get to know the board members a bit and let them get to know you and your style before introducing any changes. Having read the packets from previous board meetings, you should have a general idea of what is included. The following standard parts typically appear in each packet:

- *Agenda:* This lists everything you will be discussing at the meeting.
- *Minutes:* These describe the activity during the previous month's meeting and should hopefully be done before the new meeting.
- *Financial statements:* Each month you will include a snapshot of your library's finances, including a list of all the bills and charges for the previous month.
- *Director's report:* This is a summary of what you have done, what the library has done, and sometimes what actions have been taken on specific items from the strategic plan. You will find a director's report template in part II, "Tools."
- *Statistics:* This section comprises the overall stats of the library. It may include programming attendance, circulation, and so on, and may also be accompanied by patron stories.

Some documents (e.g., budget, contracts, and reports) in the packet will depend on what you have listed on the agenda each month. Most states will also have a timeline for required actions that the library must take each year. Check with your state library, library system, or attorney to find out what the requirements are in your area.

Finally, reach out to your neighboring libraries and meet or at least talk to the other directors. They can become an invaluable network for you when you issues or problems come up. They are also a great source for inspiration and can serve as a sounding board for ideas and problems. Being a director can be lonely because there are certain things you cannot talk about with your staff. Having a strong peer network will provide you with an outlet to vent frustrations, an avenue for problem solving, and a source of understanding.

FIRST YEAR

To really understand all of the ins and outs of being a director, you will need to experience a twelve-month cycle. The year has a certain rhythm to it that will help you understand the flow of the library. Make sure you know what your fiscal year start and end dates are. Keep in mind that certain times of year are busier and will require more forethought and planning.

During your first year, take time to jot down important events that happen annually, monthly, semiannually, and so on. Here are some events that will repeat:

- Board meetings
- Staff meetings (including staff development days)
- Meetings for library consortia or systems
- Networking group meetings
- School and other community visits that the library participates in
- Outreach events in the community
- Events hosted by the chamber of commerce and other organizations
- Annual holiday parties

By keeping track of events as they happen, you can build a calendar that will help you structure your time and prevent events from sneaking up on you.

During this time, you will also get to know your vendors. With whom do you contract? Where are the contracts? What services do the vendors provide? Reach out to regular vendors to meet them and get to know about their services.

WORK AND PERSONAL LIFE HARMONY

If you start out by looking toward the future, you can build a strong foundation for success at work. But the other key component to success is maintaining a good balance between your work and your personal life. In addition to taking breaks at work, you need to make sure you are maintaining balance in your entire life to help you create a harmonious life.

There will be times when you have a large project to complete or a pressing personnel issue to resolve, but you need to be cautious of letting your job consume your entire life. You are in charge, and you will feel overwhelmed at times. The best way to combat that is to make sure you have good systems in place in your personal life so you don't burn out. While as library director you are never really "off" duty because of the responsibilities you carry, it is possible to turn off the switch and manage your time.

But how? Technology plays a major role in our lives today, and while it can make life more efficient, it can also make you too accessible. If you feel that you need to be available 24/7, your brain won't have a chance to reset and rest. Create boundaries that will work for you to maintain balance between work demands and your need for downtime. You need to consider what will work for you. Here are some suggestions:

- Turn off notifications for e-mail on your phone and tablet.
- Refrain from doing work on weekends.
- Don't take paperwork or journals home with you. Make time to read them at work.
- Set up your schedule so you can accomplish work at work; make sure you have time on your calendar to follow up on items after meetings.
- Make some "you" time daily, whether it is practicing meditation, reading a book, listening to music, or watching TV.
- When you are off (weekends, holidays, vacations), train your staff to contact you only in emergency situations (after they call 911).

At the beginning, you may feel like you need to attend every meeting and continuing education event or participate whenever someone asks you. This is natural since you are in a learning phase and want to be engaged. Until you have a good handle on your workload, try to defer any requests for your involvement in different libraries. Don't take on more than you can handle; learn to take on what is reasonable. Keep track of how much time you spend on different tasks so you can get a sense of where you are spending your energy. If one area is consuming a lot of your time, consider what you can stop doing or delegate to someone else. You will have time to take on more commitments as you get more familiar with your responsibilities.

It is not easy to create boundaries, and most library directors will overextend themselves at some point in their careers. There will be times when creating harmony between work and personal life seems impossible, but keeping the need for boundaries in the forefront of your mind will help you be more committed and productive at work and at home.

✲ REVIEW AND REFLECT

KEY TAKEAWAYS

A director has many responsibilities. Most of them fall into these core areas:

- Personnel
- Board of trustees

- Finances
- Legal matters
- Policies and procedures
- Insurance
- Building maintenance
- Emergency planning
- Collection development
- Programming and services
- Community engagement
- Technology
- Strategic plan

Setting yourself up for success over the course of your first year includes

- walking through your building regularly;
- meeting with staff, board, and community members;
- creating a training plan for yourself;
- jotting down key dates and events;
- organizing your office and files; and
- pacing yourself so you don't become overwhelmed.

Remember that all work and no play is no good for anyone. Creating balance in your life is critical to being an effective director.

SELF-CHECK

- Have I read background information like board packets and policies and other information about the library?
- Have I created a training checklist for myself?
- Have I scheduled one-on-one sessions with managers, staff, and board members?
- What current projects are under way or about to begin?
- Based on feedback and observation, what areas of the library do I need to address immediately? In my first year? Someday?
- Have I started a calendar of library-wide and community meetings and events?
- Do I have the tools and supplies I need to help me be successful?

QUESTIONS FOR REFLECTION

- What is the best way for me to communicate with managers, staff, and the board?
- Whom do I have in my network now that I can turn to for help?

- What tasks do I need to do? What tasks can I delegate to someone else?
- What kind of communication do I want to provide for my staff, board members, and the community?
- How can I set clear boundaries to ensure I don't burn out?
- Do I have the optimum setup for my office to help me achieve peak efficiency and convey the type of director I want to be?
- How can I maintain harmony between my work and my personal life?

ADDITIONAL RESOURCES

See part II for these additional resources on starting work as a library director:

- Sample 1.1: Library Director Training Checklist
- Sample 1.2: Director's Report Template

Download additional resources on our website at www.librarydirectorstoolkit.com/resources.

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