Policy Checklist
Basic Policies for Every Library

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What Policies Are...

Decisions that Describe the Library’s Principles & Plans
- Firm guidelines for action based on a decision making process
- Statement of operations, rules, regulations and use

Basis for All Procedures
- Not a detailed course of action

Tested for Legality
- Conforms to current law
- Can be enforced without discrimination
What a Good Policy Does...

**Translates Values and Priorities into Action**
- Introductory statement tied to goals.

**Provides a Tool to do the Job**
- Understandable
- Trainable
- Review

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What a Good Policy Does...

**Ensures Equitable Service**
- Does not discriminate

**Establishes a Legal Framework for Library Services**
- Document, document, document!
## Policies vs Procedures

<table>
<thead>
<tr>
<th>Policy</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deals with the WHAT</td>
<td>Deals with the HOW</td>
</tr>
<tr>
<td>Creates the Rule</td>
<td>Implements the Rule</td>
</tr>
<tr>
<td>Stable / Long-Term</td>
<td>May Change Quickly</td>
</tr>
<tr>
<td>Consistent and Logical</td>
<td>Reflect Changes</td>
</tr>
</tbody>
</table>
Stakeholders Benefit from Both:

- Improves the quality of work
- Increases productivity
- Are a training aid for staff
- Helps us be consistent over time
- Provides basis for improvement

Writing Good Policies
Basic Steps:

- Write Prior to Crisis
- Staff Training
- Research / Copy
- Availability
- Stakeholder Input
- Review
- Board Approval
- Revise

Writing Tips – Format

- Clear Titles
- Date
- Version Number
- Purpose Statement
- Applicability
- Definitions
- Related References and Procedures
Writing Tips – Keep in Mind

- WHAT is the PURPOSE?
- WHO is the AUDIENCE?
- HOW will they USE it?

Writing Tips - Style

- Clear Objective
- Concise
- Consistent
- Complete
- Coherent
Writing Tips - Language

• Write in an Active Voice
• Be Gender-neutral / Gender-fair
• Spell out Acronyms on First Use
• Avoid:
  – jargon
  – Roman numerals
  – etc., i.e. or e.g.
  – Long, confusing strings of nouns and adjectives
  – “utilize”
  – “please”
• Keep sentences to 25 words or less
## Customers & Materials

<table>
<thead>
<tr>
<th>Circulation</th>
<th>Intellectual Freedom</th>
<th>Privacy / Confidentiality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interlibrary Loan</td>
<td>Collection Development</td>
<td>Internet Use</td>
</tr>
<tr>
<td>Unattended Minors</td>
<td>Behavior</td>
<td>Customer Service</td>
</tr>
<tr>
<td>Copyright</td>
<td>Website / Social Media</td>
<td>Fines</td>
</tr>
</tbody>
</table>

## Buildings & Safety

<table>
<thead>
<tr>
<th>Exhibits &amp; Displays</th>
<th>Meeting Rooms</th>
<th>Public Postings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Closings</td>
<td>Tobacco and other legal substances</td>
<td>Weapons</td>
</tr>
<tr>
<td>Photos / Videos</td>
<td>Bids, Quotes &amp; Contracts</td>
<td></td>
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</tbody>
</table>
## Personnel

<table>
<thead>
<tr>
<th>Employment</th>
<th>Volunteering</th>
<th>Gifts</th>
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</thead>
<tbody>
<tr>
<td>Conflict of Interest *</td>
<td>Whistleblower Protection *</td>
<td>Ethical Guidelines *</td>
</tr>
<tr>
<td>Personal Use of</td>
<td>Computer Resources</td>
<td>Public Relations / News</td>
</tr>
<tr>
<td>Materials &amp; Equipment</td>
<td></td>
<td>Media</td>
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<tr>
<td>Record Retention</td>
<td>Mileage Reimbursement</td>
<td>Company Credit Card</td>
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</tbody>
</table>

(How we do it...)

**Access to Policies and Procedures**

Carolyn Blatchley &
Wendy McClure
CCLLS Public Policies / Customer Guide

- Online
- Title and Whole Policy
- Searchable

CCLLS Staff & Board Intranet

- Online
- Word and PDF versions
- Blog of Recently Updated
CCLS Staff & Board Intranet

- Read & Acknowledge by job type
- Familiarity

Behavior Policies
Challenges & Opportunities

Writing & Enforcing Behavior Policies

- Be concise while encompassing the whole issue
- Address your library community, not individuals

Challenges & Opportunities

Behaviors to Address as a Library

- Interfere with staff or fellow patron use of the library
- Dress and hygiene
- Abusive or threatening language or physical contact
- Unattended persons with needs
Challenges & Opportunities

Behaviors Covered by Local Ordinances, State & Federal Law

- Illegal or sexual activities
- Pornography / obscene / harmful to minors
- Library theft or damage to materials
- Political solicitations
- Tobacco use and vaping

Bibliography

It Comes with the Territory: Handling Problem Situations in Libraries – Anne M. Turner

The Nonprofit’s Guide to Human Resources: Managing Your Employees & Volunteers – Jan Masaoka

The Public Library Policy Writer : A Guidebook with Model Policies on CD-ROM - Jeanette C. Larson and Herman L. Totten

Smart Policies for Workplace Technologies: Email, Blogs, Cell Phones & More – Lisa Guerin
ACTIVITY: Is it Policy or Procedure

Policy

Procedure
### ACTIVITY: Consistency in Writing

<table>
<thead>
<tr>
<th>Initial Word</th>
<th>Synonyms</th>
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</table>
# ACTIVITY: Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Term</th>
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ACTIVITY: Need Policies?

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<thead>
<tr>
<th>Customers &amp; Materials</th>
<th>Buildings &amp; Safety</th>
<th>Personnel Policies</th>
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ACTIVITY: Write a Policy

What is this Policy About?

Where will you research?

Who will you involve?

Top points / principles

How will it be available?

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