Getting Started Checklist

This section of the Library Manager's Handbook is specifically designed for new library managers.

Congratulations on your new role as Library Manager!

Even if you have worked in a library before, managing the library will be an entirely new experience. Depending on your library, you may be responsible for providing programs, developing and weeding collections, handling any difficult patron interactions, running your library's social media channels, managing staff, working with the Board of Trustees on policy and budget development, engaging in community outreach, and more.

The below **Getting Started Checklist** was created by Rebekkah Smith Aldrich of the [Mid-Hudson Library System](#) in NY, USA, and has been adapted for Shortgrass Library System. Use this checklist as you get started in your new role.

Before You Start

Before your first day, obtain basic factual information about the library:

- ☐ Library mission and vision statement

- ☐ Library Plan of Service

- ☐ Service population (municipality, additional service areas)

- ☐ Size of staff, collection, and building

- ☐ Location of the building in the community in relation to surrounding businesses, schools, municipal buildings and amenities

Your First Days

Depending on your library, your first day may already be scheduled. For instance, you might be meeting with your staff and with one or more board members, or receiving training from the previous library manager.

Regardless of what your first day actually looks like, you should aim to complete the below items as soon as possible after starting your new position.

- ☐ Library mission and vision statement

- ☐ Library Plan of Service

- ☐ Service population (municipality, additional service areas)

- ☐ Size of staff, collection, and building

- ☐ Location of the building in the community in relation to surrounding businesses, schools, municipal buildings and amenities

- ☐ Introduce yourself to all staff; find out who does what. In particular you will want to connect with:

    - ☐ Your assistant (if you have one), or a senior staff member

        - ☐ Ask the assistant for a list of staff by department, a list of your volunteers, and a list of the Board of Trustees. These lists should include names, phone numbers, email addresses, and positions.

        - ☐ Find out who has been doing the staff scheduling since the last manager left. In a smaller library this is a task the manager assumes, in a larger library you will want to become familiar with how things are done in this area.

    - ☐ The person who handles the money.

        - ☐ Set up a meeting time with your bookkeeper / treasurer / business manager to review the library's finances and budget.

        - ☐ Get an overview of the library's bank accounts and holdings.

        - ☐ Obtain and, within your first week or two, read copies of past audits of the library's finances.

    - ☐ The person who takes care of the building (facility manager/custodian):

        - ☐ Get a tour of the library. On your first go around, take note of general areas of the library – circulation desk, reference services, public access computers, children's area, fiction collection, non-fiction collection, meeting space, storage space, mechanical room, display areas, staff

work spaces and bathrooms. Save critique and suggestions for a later time.

- ☐ Ask for the keys to the library entrances, and to the manager's office (if applicable). Ask for alarm codes and alarm company contacts (if applicable).

- ☐ Locate water turn off; septic tank/sewer lines; boiler or furnace; HVAC system; circuit breakers, and alarm panels (if applicable).

☐ Contact Shortgrass Library System

- ☐ Shortgrass provides a wide range of support services for member libraries. You will learn more about what Shortgrass offers as you learn more about your role, but in the first few days:

  - ☐ Contact the Client Services Librarian to arrange an orientation session on system-wide resources, including: library eResources; programming support; training; marketing; and more.

  - ☐ Contact IT support to establish an email address and any applicable passwords. You can reach them at support@partek. More information about Shortgrass IT Support can be found on our website.

☐ Orient yourself to the manager's office or workspace. Look through the files – both physical and electronic.

☐ Locate essential documents you may need immediately:

- ☐ Budget documents

- ☐ Board policies and bylaws

- ☐ Plan of Service

- ☐ Personnel policy

- ☐ Calendar of important dates and deadlines, such as deadlines to submit applications and reports to the Public Library Services Branch (PLSB), to your municipal councils, and to any additional funders/grant providers.

- ☐ Insurance policies

- ☐ Friends leadership information (if applicable)

- ☐ Library's business continuity plan (a.k.a disaster plan)

- ☐ List of vendors and local repairmen

Your First Weeks

During your first weeks in the role:

- ☐ If a position manual exists for your role, spend some time reviewing it. If no such document exists, consider starting your own; this will come in handy as you learn the ins and outs of your position, and will be useful if someone needs to fill in for you (for example if you should fall ill).

- ☐ Introduce yourself to patrons; ask staff to point out regulars.

- ☐ Reach out and introduce yourself to:

    - ☐ Alarm company.

        - ☐ Change passwords/codes to the alarm system; inform only those who really need to know.

    - ☐ Shortgrass Library System staff, including the CEO; the Manager, Systems and Technical Services; and the Client Services Librarian (if you have not yet done so).

- ☐ Read through past minutes of board meetings to get a feel for what is going on.

- ☐ Review the library's web presence and social media.

- ☐ Shadow a staff member at all service points, including the circulation desk (even if you will not regularly be working on the service desk, it is valuable to understand what it entails).

- ☐ Work all shifts to make sure you meet all staff, volunteers, and patrons face-to-face.

- ☐ Read past annual reports to the community.

- ☐ Read past newsletters.

- ☐ Review statistics (most statistics can be found in the Library's Annual Report and Survey, which is submitted to PLSB annually in February.)

- ☐ Conduct a policy inventory

    - ☐ Section 7 of the Libraries Regulation identifies required policies, which include:

        - ☐ Confidentiality of user records

        - ☐ Orientation and continuing education of board and staff

        - ☐ Finance

        - ☐ Personnel

- [ ] Selection, acquisition and disposition of materials (Collection policy)
- [ ] Resource sharing
- [ ] Provision for library resources to be lent
- [ ] Provision for persons unable to use conventional print
- [ ] Records retention policy and schedule
- [ ] Personal Information Banks (PIB)
- [ ] Policies that are recommended include:
    - [ ] Internet and computer use
    - [ ] Library code of conduct
    - [ ] Unattended children
    - [ ] Customer service policy
    - [ ] Programming policy
    - [ ] Meeting space policy
- [ ] Create a calendar with important dates: report due dates, board meetings, system meetings, contract / policy expiration dates, etc. Your Shortgrass email includes access to a digital Google Calendar that you can use for this.
- [ ] Take steps to convey to your staff, board, patrons and the community at large that you are "open and accessible" to them.
    - [ ] Schedule a meeting with your board president to talk about the next board meeting.
    - [ ] Meet with staff and volunteers, learn about what they do, and ask their opinions on what is and isn't working.
    - [ ] Schedule a meeting with your Friends group chair (if applicable).
    - [ ] Call and introduce yourself to:
        - [ ] The Chief Administrative Officer for your municipality;
        - [ ] Library managers from surrounding libraries;
        - [ ] Insurance company;
        - [ ] Local authorities such as mayor, chief of police, fire chief
        - [ ] Head of the Chamber of Commerce

☐ Local media (newspapers, radio, etc.)

☐ **If you are not already familiar with the below, you should also take the time to read and understand the following:**

  ☐ Alberta *Libraries Act* (PLSB)

  ☐ Alberta *Libraries Regulation* (PLSB)

  ☐ *Best Practices for Public Libraries in Alberta* (PLSB)

  ☐ Library Bill of Rights from the American Library Association

  ☐ Statement on Intellectual Freedom (Canadian Federation of Library Associations)

  ☐ Statement on Diversity and Inclusion (Canadian Federation of Library Associations)

  ☐ Review other tools and resources available from the Provincial Library Services Branch.

Your First Months

During your first months in the role:

- ☐ Conduct a facility inventory, inside and out.

    - ☐ Note problem areas.

    - ☐ Determine age of major systems: HVAC, roof, wiring, etc.

    - ☐ Review or establish a "key inventory." Who has keys to your library? If it seems like too many people or you learn that people outside of your supervision have keys, you may want to consider having locks re-keyed to start fresh and get "key control" of your building.

    - ☐ Assess the maintenance routine.

    - ☐ Are the circuit breakers and water shut off labeled?

    - ☐ Conduct a signage inventory (inside and out) – could a new patron find their way around? Learn about services? Know where to go for help and how to access services? Would they even know to come through the door?

    - ☐ Is there a fire drill schedule/procedure in place?

- ☐ Get an introduction to the technology infrastructure in the library – staff and patron-access computers – how many do you have, what software is on them, network structure, security measures in place, passwords, etc.

- ☐ Conduct a Communications Assessment

    - ☐ How does the library currently communicate internally and externally:

        - ☐ Staff communications

        - ☐ Board communications

        - ☐ Friends communications

        - ☐ Patron signage, notification and publicity

        - ☐ Community-wide publicity

    - ☐ How does the library receive communication from patrons and the community?

- ☐ Attend meetings with other libraries in your system (contact the Shortgrass Client Services Librarian to learn more about library manager meetings)

- ☐ As early as possible, start to find ways to become visible as a community leader locally, for example, join the Chamber of Commerce or a service organization, participate in

community events, and attend local happenings. It's not enough to just attend - introduce yourself and tell people what you do!

- [ ] Call and introduce yourself to:
    - [ ] School principals (including primary, secondary and post-secondary)
    - [ ] Local shelters, food banks, etc.
    - [ ] Local Arts councils
    - [ ] Local support services
    - [ ] Other heads of prominent nonprofits in the community