

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. There's a lot to learn, and this checklist will help you get started.

We recommend using this document in conjunction with any onboarding checklists provided by your library, and adapting it to suit your role and your library.

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.

Building Relationships

- Introduce yourself to all of your staff. Schedule a meeting with your assistant or a senior staff member, to learn the following information.
 - Ask 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.
 - Spend some time getting to know your staff and learning about what they do in the library on a day-to-day basis- they will have a lot of knowledge that will be invaluable to you as you get started.
 - Ask about your library's delivery schedule. Ensure that you understand how deliveries work within the library system.
- Introduce yourself to the person who handles the money (treasurer, bookkeeper, etc.), and arrange a meeting with them.
- Introduce yourself to the person who takes care of the building (if applicable).
- Introduce yourself to the Library Board Chair, and if possible, arrange a meeting with them in advance of your first Board meeting.
- 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; outreach; technology; 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.](#)

Governance & Leadership

- Locate and review the following:
 - 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.
 - Orient yourself to the manager's office or workspace. Look through the files – both physical and electronic.
- Locate essential documents you may need immediately. Make a note of anything that does not yet exist, and add it to your to-do list:
 - Budget documents
 - Board policies and bylaws
 - Plan of Service
 - Personnel policies
 - Calendar of important dates and deadlines, such as deadlines to submit regular reports to your board; applications and reports to the Public Library Services Branch (PLSB); reports to your municipal councils; and to any additional funders/grant providers.
 - Insurance policies (for facility, for the Board, etc.)
 - Friends group information (if applicable)
 - Library's business continuity plan (a.k.a disaster plan)
 - List of vendors and local repairmen
 - Library administrative paperwork
- Take some time to start reviewing the [Library Manager's Handbook](#), available on the Shortgrass website.

Library Operations

Programming

- Review the programming schedule for the upcoming weeks, and arrange to attend & shadow as many programs as possible.

Collections

- Tour the collection and start becoming familiar with the library's physical holdings. Make sure you learn where fiction, nonfiction, DVDs, YA, and children's materials are located.
- Pay attention to how the collection is organized, how displays are set up, etc. Consider areas of improvement, but save critiques for a later time.
- Even if shelving & hold pick lists will not be part of your regular tasks, complete these tasks in the first few weeks to learn how the library is organized.

Circulation / Materials Handling

- Review the basic library materials handling procedures, even if this will not be one of your regular tasks. The key procedures to learn immediately are checking items in, checking items out, and renewing items.

Facility

- Arrange for a full tour of the facility, including mechanical rooms, storage areas in and outside of the building, and a full tour of the exterior.
- Ask for the keys to the library entrances, and to the manager's office if applicable. Ensure that you have keys / access to all areas of the facility, including mechanical rooms.
- 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).
- Review how the library is organized- shelving layout, circulation desk (and reference desk if applicable), public access computers, storage space, children's area, teen area (if applicable), seating area (if applicable), mechanical room, staff workspace, washrooms. Note areas for improvement, but save critiques for a later time.

Technology

- Spend some time learning what technology is available in the library- public access computers, staff computers, laptops, ereaders, tablets, etc.
- Locate usernames and passwords for all computers, laptops, tablets, and any accounts you need immediate access to (for example, WorkFlows; purchasing accounts).

Communications

- Locate (and change, if necessary) passwords for social media accounts held by the library. This may include Facebook, Twitter, and Instagram, in addition to scheduling software such as Hootsuite or Buffer.

Personnel

- Familiarize yourself with the staff schedule. Learn how things like absences work- what is the procedure for when someone is on vacation, or when someone is out sick?
- Begin 1-1 meetings with library staff, to learn about their roles and to discuss what is working or is not working in their position.

Your First Weeks

During your first weeks in the role:

Building Relationships

- Arrange to meet with the following community members, either in person or by phone/video call:
 - Library Board Members
 - Library patrons (ask your staff to point out the regulars)
 - Alarm company (change the codes if necessary; inform those who need to know)
 - Insurance company
 - Chief Administrative Officer for your municipality
 - Local media (newspapers, radio, etc.)
 - Chair of Friends group (if applicable)
 - [Shortgrass Library System staff](#), including the CEO; the Manager, Systems and Technical Services; and the Client Services Librarian.
 - Library managers across the rest of the Shortgrass system, especially those nearest to you.
- Take steps to convey to your staff, board, patrons and the community at large that you are “open and accessible” to them.

Governance & Leadership

- 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).
 - This position manual should ideally include (or be supplemented by) a calendar of important dates: report due dates, board meetings, system meetings, contract / policy expiration dates, provincial grant deadlines, etc. Your Shortgrass email includes access to a digital Google Calendar that you can use for this.
- Review the following documents. Make a note of anything that does not yet exist, and add it to your to-do list:
 - Minutes of previous year board meeting minutes.
 - Past annual reports to the community.

- Past newsletters.
- Most recent library statistics (most statistics can be found in the Library's Annual Report and Survey, which is submitted to PLSB annually in February).
 - Make a note on what statistics you need to track throughout the year- for example, volunteer hours; reference questions answered; the number of programs run and how many people attended.
- Review the library's web presence and social media, and communications/marketing strategies if applicable.
- Review all library policies.
- Review any community needs survey data.
- Learn about how your Library Board works
 - Attend a Board Basics workshop, hosted by PLSB.
 - Learn about the process for appointing new board members.
 - Learn about how policies are created, reviewed, and approved.
 - Meet with the Library Board Chair to discuss the next board meeting. Talk about their expectations of you. For example, you may need to submit a monthly report, and may need to provide the treasurer with details for the financial report.
- Meet with the person in charge of your library's finances.
 - Set up a time to review the library's finances and budget.
 - Become familiar with the library's financial tracking & accounting practices.
 - Review your library's allotment fund for collection development.
 - 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.
 - Ensure that you are familiar with details around payroll, benefits, pensions, etc., and are clear on what is your responsibility.
 - For example, if you need to submit timesheets to the town office, ensure you know what is required and any relevant deadlines.
 - Most of your funding will come from municipal and provincial grants; determine where you can find additional funding to support your programs and services, such as grants, donations, and other partnerships.

- 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)
 - [Provincial Resource Sharing & Public Library Network Policies](#) (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](#).

Library Operations

Programming

- Continue to observe programs as time permits.
- If you will be responsible for particular programs, don't hesitate to contact Shortgrass to ask for resources and training tools.

Collections

- Locate and review the library's annual budget for collections.
- Locate and review the library's collection development policy and/or plans.
- Determine when the library's most recent collection inventory took place. If it has been several years, [speak to the Manager, Systems and Technical Services, or the Client Services Librarian](#) to learn more.
- If you have not yet had any training on collections & ordering, speak to the [Client Services Librarian](#) to arrange this.

Circulation / Materials Handling

- Shadow a staff member at the circulation desk, if you have not already. This is a great place to meet patrons; ask staff to point out regulars.

- Learn more advanced WorkFlows procedures. Ensure that you know how to create an account, update an account, access the holds list, and more. The [Library Manager's Handbook](#) includes an Essential WorkFlows Procedures manual.
- Learn about Inter-Library Loans, and ME Libraries. Your Shortgrass training will cover this, but if you are still waiting for this training, try placing an ILL request to see how it works.

Technology

- Review the library's network and systems.
- If you have any questions about the technology available at your library, direct them to the [Manager, Systems and Technical Services](#). They may redirect you to Shortgrass' IT support services, depending on the questions.
- Ensure that you know how to contact Shortgrass' IT support services.

Communications

- Determine all the current areas of library communication to the public (e.g. local bulletin boards, local Facebook pages, local newspaper or radio station).
- Review the public-facing communications from the past six months to get a sense of what is being shared (for example, newsletters, posters, social media).

Personnel

- Continue 1-1 meetings with your staff, to learn about their roles and get their perspective on what works and what doesn't.
- Work all shifts to make sure you meet all staff, volunteers, and patrons face-to-face.
- Review employee files, including job descriptions, evaluations, and collective agreement (if applicable).
- Review employee manuals, policies, procedures, contracts, and any other relevant documentation.
- In addition to your library's policies, review [Alberta's Employment Standards](#) to ensure that you are familiar with requirements around vacation time, sick leave, employment insurance, benefits, and more.
- Talk to your staff to determine their professional development needs.

Your First Months

During your first months in the role:

Building Relationships

- Begin to build your professional network:
 - 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!
 - Plan to attend local professional development events and other networking opportunities.
- 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
 - Mayor for your municipality
 - Local authorities such as mayor, chief of police, fire chief
 - Head of the Chamber of Commerce
- Contact PLSB to update your contact information with them. You can get in touch with Shortgrass for information on whom to contact.

Governance & Leadership

- Conduct a policy inventory. Review your library's policies, noting expiry dates, outdated language, etc. Locate or develop a schedule for regular updates to all your policies, and add it to your position handbook / calendar.
 - 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
- If you have not yet attended a Board Basics workshop from PLSB, arrange to do so.

Library Operations

Programming

- Conduct a program review.:
 - What programs is the library currently offering?
 - Are these programs consistent with your Plan of Service?
 - Are there any obvious gaps? Any demand that current program offerings are not meeting?
 - Review funding sources (if any) for special programs.
 - Review staff programming capabilities.

- Review what resources are available for programs. Are these sufficient? Do programmers need more resources?
- Determine how programs are currently being evaluated. If no evaluation process is in place, consider setting one up. Collecting user feedback can help determine if you are meeting community needs, and how you can improve your offerings.

Collections

- Your training with Shortgrass should include information on system-wide collection development sources and procedures. If you have not yet had this training contact the [Client Services Librarian](#).
- Ensure that the library is on track for collection expenditures for the current year.
- Review Shortgrass' eResources by taking [eSkills Challenges](#), to familiarize yourself with the resources from a patron's perspective.

Circulation / Materials Handling

- Review shelving locations for all collections. Are your collections accessible, well-signed, and easy to find?
- Familiarize yourself with more advanced functions in WorkFlows, such as waiving fines, checking your acquisitions balanced, etc.
- Review your library's procedures for handling / managing overdue and lost item fines.

Facility

- Conduct a facility inventory, inside and out.
 - Note problem areas, both inside and outside of the building.
 - Is your building accessible? How could accessibility be improved?
 - 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?

Technology

- Conduct a technology inventory:
 - Get to know the technology infrastructure in the library, including both staff and public access computers.
 - Know what software is on them, network structure, security measures, passwords, etc.
 - Identify any gaps or needs.

Communications

- 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? (Email, phone, contact form on website).
 - Review the library's web and social media strategy.
 - Develop a simple communication plan if your library does not yet have one.

Personnel

- Review the library's performance evaluation schedule.
- Schedule and perform any upcoming evaluations.
- Determine PD funds and opportunities for yourself and your staff members. Your [Client Services Librarian](#) can help you identify free or low-cost PD opportunities.