

Trustee Tale

Trustee Tale is a joint project of the Manitowoc Calumet Library System, Nicolet Federated Library System, Outagamie Waupaca Library System, Winnefox Library System and Wisconsin Valley Library System.

If you have questions, comments, or suggestions for future articles, contact your system director.



Policy Development with the Library Board

The Importance of Library Policies

Policies may not prevent problems from arising in your library, but having up-to-date policies equips staff with the tools they need to face routine or tough issues when they do arise. Well-written, board-approved policies achieve several things:

- They encourage stability and continuity in the library's operations while reducing ambiguity and confusion about ongoing practice and procedure.
- Inform the community about the library's intent, goals, and aspirations.
- Give the public a means to evaluate library performance and show that the library is willing to be held accountable for its decisions.
- Serve as evidence of the library's normal practices, based on policies and procedures that reflect thorough research, sound judgment, and careful planning.
- Help prevent claims of bias or arbitrary selection.



The Trustees' Role in Developing Policies

Developing library policies isn't easy. As Trustees, you will need to think about the ideas and understand their impact. Your role in policymaking can result in a greater consensus about and more cohesive philosophy of service for the library and staff. Encouraging debate and public involvement during this process is vital so that differing views are worked out before the policy is put into place, avoiding future disagreement. Once the Board officially adopts a policy, you must support the policies and answer questions about them in a positive manner.

Policy Development Steps

The following basic steps provide for careful development and review of library policies:

1. The Library Director, with staff input, develops recommended policies.
2. The Library Board discusses, revises (if necessary), and approves policies in properly noticed public meetings.
3. The Library Director ensures staff and public are aware of new or revised policies.
4. The Library Board reviews policies on a regular cycle.

Legal Policies

It is important for policies to be legal to avoid opening the municipality to liability. Below are the four tests of a legally defensible policy:

Test #1: Policies must comply with current statutes and case law. For example: A library policy charging for use of computers in the library would be contrary to Wisconsin Statutes Section 43.52(2), which requires that essential public library services be provided free of charge.

Test #2: Policies must be reasonable (and all penalties must be reasonable). For example: A library policy that says, "All talking in the library is prohibited, and anyone who talks in the library will permanently lose library use privileges," is clearly an unreasonable rule and penalty.

Test #3: Policies must be clear (not ambiguous or vague). For example: A policy that says, "Library use privileges will be revoked if a patron has too many overdue books," is too vague to be fairly administered.

Test #4: Policies must be applied without discrimination. For example: If a library waives fines, that waiver must be available to all patrons on an equal basis—not just to friends of library staff or to politically important people.

If questions arise, consult your municipality's legal counsel or have an outside attorney review the policy to ensure it is legal. However, this review is not required if the above four tests are followed.

Policy vs. Procedure

A policy is a generic term used for the policy statement, regulation, procedure, or guideline that applies to a specific issue. Policy statements describe why the library has the policy. Procedures are written, step-by-step descriptions of how the staff will carry out the policy.

While the Library Board is responsible for adopting policies, the library director's role is to develop the procedures which carry out the policies. Procedure manuals outline the steps necessary to accomplish various tasks. A combined policy and procedure manual can provide an organized, single reference point for library policies and the procedures staff needs to carry them out.

Timing

Adopting and maintaining policies should be a high priority for the Library Board every year. Additionally, the Board should create a schedule for a policy audit every three to five years. As the Board reviews, updates, or adds policies, compile in a standard format for consistency and ease-of-use.

Sample Policies

Search library websites or reach out to colleagues from similarly sized libraries for examples.