Kentucky Department for Libraries and Archives

Director's Starter Checklist

What to do in your first days, weeks, and months as a library director[*]

Welcome to your new role as a Kentucky Public Library Director! These guidelines suggest things to do as you get settled in. They'll help you identify priorities without feeling overwhelmed. They are recommendations only—don't beat yourself up if you don't do everything in the time frame listed.

In general, we advise that you avoid major changes in the first few months. Make note of possible changes, but don't rush to implement them. Give yourself time to develop a good understanding of how things are currently being done and <u>why</u>.

This list may also help spark questions to ask your KDLA Regional Consultant.

Before You Start
- ❑ Know basic factual information about the library
  - o County (or service area) population
  - o Size of staff, collection, building, branches (if applicable)
  - o Location of library within the community/service area
    - ▪ Outlying communities or other regions in the county served by the library
    - ▪ Schools, health department, emergency services, and other community partners
  - o Source(s) of library funding

First Day(s)
- ❑ Introduce yourself to all staff
- ❑ Get contact lists for staff and board of trustees
- ❑ Meet with the person who handles library's money
  - o Review budget and accounts
  - o Have library board approve access to accounts
- ❑ Tour the library
  - o Get a general overview of what departments are where, server and mechanical rooms, display areas
- ❑ Get building keys
- ❑ Establish email address, get logins/passwords for director's computer and staff network
  - o Obtain access/credentials for previous director's email and computer files
  - o Regularly check previous director's email for important notices
- ❑ Familiarize yourself with the history of the library
- ❑ Orient yourself to office—go through files (paper & digital) and locate essential documents (**Consult Records Retention Schedules before discarding ANY documents/files.**)
  - o Director job description
  - o Organizational chart and staff job descriptions
  - o Mission statement and strategic/long-range plan
  - o Policy manual and employee handbook
  - o Documents pertaining to new building/construction project (if applicable)
  - o Library's disaster/emergency plan
  - o Budget documents
  - o Board bylaws and policies
  - o Public Library Calendar (for reporting deadlines, etc.)

- Friends Group and Library Foundation information (if applicable)
- List of vendors, maintenance and repair contractors, etc.
- Local emergency contact numbers
- Insurance policies

First Week(s)

- ❑ Ask your Regional Consultant to sign you up for the Kentucky public library directors LISTSERV®
- ❑ Get to know your building
  - Learn how to enter the building and disarm the alarm (if applicable)
    - Contact alarm company—change passwords and codes
  - Light switches
  - Thermostats
  - Emergency exits
  - Fire extinguishers, flashlights, first aid kits, spill kits
    - Shut-offs for water, electric, gas—Are they labeled?
- ❑ Observe circulation desk(s) and attend programs
  - Introduce yourself to patrons; ask staff to point out regulars
- ❑ Work all shifts to make sure you meet all staff face-to-face
- ❑ Familiarize yourself with recurring programs and dates (summer reading program, story times, book sales, etc.)
- ❑ Review library's web and social media presence and which staff members have access
- ❑ Be open and accessible to staff/community--and let them know that!
  - Meet with board president
  - Interview staff, find out what they do, ask what's working and what's not
  - Meet with Friends Group president and Library Foundation president (if applicable)
- ❑ Review existing policies and procedures
- ❑ Familiarize yourself with library board of trustees meeting schedule, monthly board packet, trustee appointment process, term expiration dates, and board officers
- ❑ Read through past minutes of board meetings
- ❑ Apply for initial or temporary certification
- ❑ Add important dates to your calendar; for example
  - DLG (Department for Local Government) reporting dates
    - Locate your DLG login credentials
  - Annual Report
  - Fiscal year
  - Board meetings
  - Policy/contract expiration dates
  - E-rate deadlines (if applicable)
- ❑ Call and introduce yourself to
  - County Judge Executive (CJE), Mayor, and County Clerk
  - Chief of Police and Fire Chief
  - Insurance company
  - 3rd party technology providers (if applicable)
  - Head of chamber of commerce
  - Local media (newspapers, TV, etc.)

First Month(s)

- ❑ Meet your KDLA Regional Consultant
- ❑ Familiarize yourself with KDLA's services and support, including
  - o Kentucky Public Library Directors' Toolkit
  - o Kentucky Public Library Trustee Certification Program
  - o Kentucky Public Library Trustee Manual
  - o Staff Certification and Continuing Education
  - o LISTSERV® Mailing Lists
  - o Lending Collections
- ❑ Familiarize yourself with the Kentucky Public Library Standards
- ❑ Familiarize yourself with library laws and Open Meetings and Open Records Acts
- ❑ Review recent annual reports and statistics
- ❑ Review recent audits
- ❑ Conduct a facility inventory, inside and out
  - o Walk through public areas with a focus on patron perspective
    - ▪ Are there too many signs in the building? Do they make sense?
    - ▪ Is the collection well organized?
    - ▪ Do things appear clean, uncluttered, in good repair?
  - o Problem areas
  - o Age of major systems (roof, HVAC, etc.)
  - o Review facilities maintenance schedule
  - o Fire drill schedule/procedure
  - o Tornado/severe storm procedure
  - o Review/establish key and alarm code inventory
- ❑ Get an introduction to technology infrastructure
  - o How many computers, where? Who has access to them (patrons, staff, etc.)
  - o What software is used? Does the library use filtering software?
  - o Security measures in place
- ❑ Communications assessment
  - o How does the library communicate with staff? Board? Patrons? Community in general?
  - o How does the library receive communication from patrons/community?
- ❑ Find ways to become visible as a leader in the community
  - o Join chamber of commerce and/or service organizations (Lions Club, Rotary, etc.)
  - o Participate in community events
    - ▪ Don't just show up—introduce yourself and tell people what you do!
  - o Develop an elevator speech and short handout highlighting compelling statistics and information about your library
- ❑ Call and introduce yourself to
  - o School principals/superintendent(s)
  - o Local shelters/missions
  - o Local arts council
  - o Other heads of prominent nonprofits in the community
  - o Neighboring libraries

*These ideas were drawn from many sources, but special thanks to the following: *Handbook for New Public Library Directors in New York State*, *Wyoming Public Library Directors' Handbook*, *Manual for New Directors of Public Libraries in Utah*, and *The Public Library Director's Toolkit* by Kate Hall & Kathy Parker (ALA Editions, 2019).