

ALA GUIDES FOR THE BUSY LIBRARIAN

EDITED BY CAROL SMALLWOOD



The image shows a close-up of a spiral-bound notebook with a silver metal spiral binding on the left. A silver and black pen lies diagonally across the notebook's pages. The pages contain handwritten notes in black ink, including a flowchart with arrows pointing downwards. The notes include: "Person meeting", "ASC Review", "meet Tom lunch", "CDC over", "Board Review", "Conference call with SWA Assoc.", "Budget", "OUT EARLY", "Get Ball out", "Printed", "Get Early", "color sheet". There are also some other notes like "Bring 20", "Fly to Lab", and "11:30 AM".

# LIBRARY MANAGEMENT TIPS THAT WORK

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CAROL SMALLWOOD, EDITOR

AMERICAN LIBRARY ASSOCIATION  
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**Carol Smallwood** received her MLS from Western Michigan University and her MA in history from Eastern Michigan University. *Writing and Publishing: The Librarian's Handbook* and *Librarians as Community Partners: An Outreach Handbook* are 2010 ALA anthologies she has edited. *Lily's Odyssey* and *Contemporary American Women: Our Defining Passages* are new releases outside librarianship. Her magazine credits include *The Writer's Chronicle*, *English Journal*, and *Michigan Feminist Studies*; her library experience covers work in school, public, academic, and special libraries as well as being an administrator and consultant. This is her twenty-fourth published book.

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# FOREWORD

**THE DIVERSITY** of topics covered in this book attests to the broad scope of responsibilities that managing libraries requires. Managers must prepare their buildings and staffs for disasters, set standards and enforce rules, and trust their staff members to have the judgment necessary to get the work done on a daily basis. One major theme of this book is that managers of libraries do so much more than approve payroll and build collections, especially when personnel is limited.

All of these aspects and more must be considered in order to operate a library with unique local circumstances while continuing to build rapport with the community. As Lynn Hawkins, executive director of Mentor (Ohio) Public Library writes, libraries and library managers have “long arms” that must embrace an even longer list of responsibilities. Different management styles are required for overall success, which is why supervisors should also be enablers. They should enable their library’s patrons to be proactive with their own needs, and they should enable their staff to reach out with their own powerful “long arms” to provide innovative and entrepreneurial means of assisting patrons.

The experiences of this volume’s contributors are proven ways of achieving goals. Chapters discuss the all-important role of communication, how to work with boards, ways to capitalize on resources at hand such as volunteers, creating and fostering partnerships, and how to merge service points—which is more than a current trend; it is a new standard that libraries face because their budgets cannot support enough staff to maintain different service desks. Other chapters relate plans for engaging students and patrons, taking advantage of open-source information technology to assist with management goals, and coaxing still more work out of employees, along with even more best practices for handling public relations and marketing.

Although libraries are in the business of providing customers with information and services as a kind of product, business models do not speak to the intricacies involved with running a library. After reading this book, we see the nuances of models and segments of styles that library managers seem to adopt instinctively.

Among their many roles, libraries are community centers, gathering spaces, academic pivot points, harbors, workspaces, learning centers, computing centers, publicity firms, and technology hubs. That librarians become managers without the formal education of business majors speaks to the entrepreneurial, adaptive, motivated spirit of people who work in libraries. Librarians know that success is measured not by the

value of stocks and bonds but by the quality of services provided and by the gratitude shown by patrons.

Management responsibilities often come to librarians in difficult times, as when budgets forbid new hires, when blended librarianship is the norm, when young librarians are thrust into leadership positions without the leisure of gaining experience by rising through the ranks, and when new generations of technology dictate a new paradigm for the administration and role of libraries. As long as anthologies such as this document how we accomplish our work in these changing times, people in management positions will be ready to meet the needs of communities.

—Melissa J. Clapp, George A. Smathers Libraries, University of Florida

# PREFACE

**LIBRARY MANAGEMENT TIPS THAT WORK** is an anthology for public, academic, special, and school librarians looking for successful examples of management when so much is changing in the profession: how to manage staff, time, boards, emergencies, finances, stress, patrons, technology, and related topics day after day with budget and staff cuts. It provides guidance on planning as well as execution. Managers are sometimes defined as those who bring out the best in others; in the library it is a term not limited to directors but includes youth services coordinators, reader advisors, web administrators, and circulation heads, any of whom could be in small rural libraries or large urban settings. This collection is for beginners as well as old hands, and for solo librarians and those part of a large staff. It includes chapters centered on practical results by librarians making hard choices to provide the best service, whether that be one of the library's many specialized services or activities more commonly associated with library directors.

Management is central to good libraries, no matter the type of library or the librarian's position title and roles, but it is largely learn-as-you-go, as expressed by the librarians who generously share their experiences in this volume. You may have had management classes, read books on management style, and attended workshops and webinars filled with well-designed organization charts, but these chapters will provide valuable insight on how influential managers really are—and on what they can do to make that influence work for the library and its patrons.

For this collection, I sought chapters from practicing public, school, academic, and special librarians from different areas in the country. I asked contributors to write concise, how-to case studies of successful managers employing innovation. Some suggested topics in the call were staff flex hours, financial planning, administrative skills, public relations, time management, library boards, partnering, library manuals, professional ethics, innovative technology, handling employees, and volunteers.

It was my privilege to work with the librarians willing to share their experiences. These dedicated and creative professionals illustrate many facets of what makes an effective library manager—what really works in these challenging times.

Carol Smallwood

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# BEATING THE CLOCK: ADAPTIVE TIME MANAGEMENT IN A FLUID ENVIRONMENT

*Geoffrey P. Timms*

**MANAGING OUR** time would be easy if the environment in which we worked was stable, consistent, and predictable. This is not the reality in which most of us function. The unexpected regularly encroaches, threatening to hinder our plans and consume our time. We can prepare ourselves to master our schedules, even when we are not fully in control of what we must address.

## DEVELOP A ROUTINE

At the beginning of the year we may each have goals and priorities in mind as well as a clear understanding of our daily responsibilities. An effective way to ensure that regular tasks are accomplished is to perform them in a routine, predictable way, perhaps even at the same time each day or week. Comprehensive tasks, associated with goals, can be allocated their own routines. We might set aside a partial day each week for a specific activity to ensure that over time we give it due attention. For goals that we must accomplish in a short time span, we may need to allocate priority time during a specific week to ensure their timely fulfillment. Sometimes I alert colleagues that my open-door policy is suspended (except for emergencies) during specific hours. Productivity software, such as Google Calendar, can be invaluable for organizing time each week. By using this visual tool, we can easily identify unallocated time and be reminded about specific tasks. With Google Calendar, multiple calendars can be viewed simultaneously.

Many of us deal with endless streams of tasks, trickling steadily into our lives through e-mail. Taking time to read, process, and file e-mail is an essential part of staying on the ball. Strategies for managing e-mail and the tasks they bring us include these:

- If it should be deleted and forgotten, do so immediately.
- If it can be dealt with swiftly and now, get it done and delete the e-mail.
- Use a separate e-mail account for personal e-mail.
- Forward (delegate) tasks to those who should address them.
- Take time weekly to clear up the in-box.

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### QUICK TIP

*Set aside regular time to read e-mail and deal with each message just once.*

- Develop a filing system and use it, making your old e-mail much easier to find.
- Take advantage of e-mail filtering to send messages from mailing lists directly to folders and focus on them at a specific time.
- Avoid double-handling any task.

## MAINTAIN PERSPECTIVE

When unexpected tasks are added to our workload with little warning, we can be tempted to fall into the trap of feeling overwhelmed. We may indeed actually be overwhelmed, burdened with an impossible set of tasks to complete in a set

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### QUICK TIP

*Turn the negative energy of worry into the positive energy of action by focusing on one task rather than all of them.*

time frame. Feeling overwhelmed, however, can lead to a reflective paralysis in which one focuses on the enormity of the combined tasks without actually making progress on anything. We can avoid this by maintaining perspective and by being prepared with a system for prioritizing tasks. Perspective recognizes that we can hold ourselves responsible to accomplish only so much in a given time frame. Prioritizing enables us to make the best choices about what we try to tackle and to focus on specific tasks.

For the perfectionist, it is difficult to say of a task, “That’s good enough.” Although we may have a desire to complete each task with a high level of quality, there are times when we need to accept that a task has been completed sufficiently and that it is time to move on to the next one. This is by no means negligence but more a recognition that a productivity/quality tradeoff exists. There is a time to emphasize quality, but there is also a time to focus on getting multiple tasks completed.

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### QUICK TIP

*Improve your effectiveness by documenting and tackling tasks according to their priority. Look for opportunities to complete tasks according to available time.*

## DOCUMENT AND PRIORITIZE TASKS

Keeping a running list of tasks helps to focus the mind and avoid the time wasted when perspective is lost. There is no need to wonder what to tackle next when an up-to-date ranked list of tasks is at hand. I maintain two lists that sit prominently on my desk. One is my annual goals document, which contains a breakdown of the main tasks I must tackle. The other is a running list of the tasks that arise every day. The running list has two columns representing categories of priority and a third column for lesser tasks, each of which should require thirty minutes or less to complete. As each additional task arises, I add it to one of the three columns on the basis of its urgency. Within its column I rank it with a note or symbol to identify its priority within the list. Also included are tasks from the goals document. In this way, I always have a quick reference document at hand, and it is clear what I must address next.

Lists also help us fill unused time slots. After we have worked most of the morning on a task and have thirty minutes left before lunch, a list helps us identify tasks we can complete within that time. This helps us avoid wasting thirty minutes of the day in anticipation of lunch. Ideally we should complete tasks in one session, especially those that require deep concentration. For me, this is particularly true of troubleshooting errors in computer scripts. I need sufficient time to immerse myself in the logic and language of scripts. I find it fruitless to spend fragmented time on such tasks; I achieve results much more effectively when addressing them in one sitting.

## THINK BROADLY

With so many tasks and projects being collaborative or interdependent, it follows that the success of others may depend on us. When a colleague approaches me with a request for logistical support, it is tempting to prioritize it lower than the tasks for which I am directly responsible. That, however, would be shortsighted. Thinking more broadly about the library as a whole, I try to recognize that helping colleagues overcome hurdles frees them up to advance their own contributions toward the library's goals. This may have to be accomplished at the expense of parts of my own agenda for the week. As long as we honestly address both our and others' priorities with a broad perspective in mind and come to the conclusion that such a sacrifice is best for the overall efficiency of the library, we can consider it time well spent.

## COMMUNICATE TIME ISSUES

It is widely agreed that of the 24 hours in a day we can work only so much before we drop. Similarly, good supervisors are aware and accepting of the need to readdress plans when the unexpected occurs. Arming ourselves with accurate information and identifying and agreeing on priorities eliminate much of the worry associated with being overwhelmed. It is also noteworthy that it is better to be up front and honest than to surprise a supervisor with the news that a task is incomplete. The impact can affect other colleagues if their work is dependent on our own. Finally, it is important to enjoy the satisfaction of completing a task. A quick walk around the library or a trip to the coffeepot can be considered time well invested if it helps refresh the mind and transition between tasks. The key is to not get tempted to go chat to a colleague for half an hour and spend the time unwisely.

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### QUICK TIP

*Welcome opportunities to help others be effective in their tasks; interdependency is necessary for accomplishing common goals.*

## 2

# CREATING MANUALS FOR JOB DUTIES

*Holly Flynn*

**THERE ARE** many good reasons for a librarian to create a manual of his or her job duties. In the event that a librarian goes on a leave of absence—whether long-term or short-term—a manual provides management documentation for getting that librarian’s assigned tasks completed in the interim. When a librarian retires, a manual is a way to pass on institutional knowledge that might not be documented elsewhere. Even if a manual is never used while a librarian is away, it helps the librarian writing it to become better organized, as I have experienced myself.

I have gone on two maternity leaves in three years, for a total of six months. During my first leave I was the solo librarian at two branch libraries and managed one full-time library assistant. For the second leave, I managed two full-time assistants at two locations, one sixty miles away from our main campus. I knew that, given the economy and poor budget years, a temporary librarian would not be hired to replace me. I needed to train several colleagues to fill in while I was gone. I also needed to ensure that my patrons were not inconvenienced during this time. Finally, I wanted my library assistants to refer inquiries to other librarians instead of acting as librarians and risk working above their union pay grade.

Writing a job manual is a bit like trying to write a parenting manual: it is going to be different for everyone, and you cannot possibly cover every contingency. There are, however, a few basic steps you can take to be successful: keep a log of your daily tasks; write down personal practices and procedures; find backups and train them; and record passwords and contact information.

## KEEP TRACK OF EVERYTHING YOU DO

Most of us cram many tasks into a single workday: possibly a reference shift, a library instruction class, story time, committee meetings, and more. Try to keep a fairly detailed list of everything you work on for several weeks. As you read through it later, it will become clear what you spend the most time on and what your highest priorities are. This helps you later when you start writing down policies and procedures for these tasks. If you are a reference librarian, keep track of all the questions you are asked and where to find the answers. If your library uses a software program for keeping statistics, such as DeskTracker, you can notate your statistics there and run a report later.

## WRITE DOWN PERSONAL PRACTICES AND PROCEDURES FOR EACH AREA OF YOUR JOB

If your library has general procedures in place and current documentation for them, there is no need to rewrite that. You may want to include reference to the relevant

public web pages in your manual, since those are usually kept more up to date than private documentation. However, if you do something differently, or have different priorities than other librarians, write those down. Include every detail. Remember that, although you may do tasks much like others at your library, you probably have your own unique way of doing them. Think of the librarian who has worked at your library for thirty years or more. She knows her subject area and patrons thoroughly. Eventually she will retire, and without a written manual all of that knowledge will be lost. Manuals are an excellent way to preserve the institutional memory of an organization. Not only do they work as a stopgap for management until a new person is hired, they are also a valuable tool for the new librarian.

## **FIND SEVERAL PEOPLE TO FILL IN FOR YOU, AND TRAIN THEM**

Once you have the main components of your manual—procedures for various areas of responsibility—you need to find colleagues to serve as your substitute in each area. In the event that you are unavailable to work for a while, this assures that each aspect of your job is covered while not overworking any one person. For instance, if you work the reference desk, have another reference librarian cover your reference questions, whether they are presented in person, through e-mail, or chat. If you are a subject selector, have another collections colleague with a similar subject area trained to buy books and other material for you in the event that your patrons request something. If you need someone with specialized expertise, you may want to work with someone from your professional organization. Generally speaking, if you know you are going to be gone only for a short time, others are usually willing to help.

When it comes to training your temporary stand-ins, simply giving them a copy of your manual is not enough. Work with them personally to ensure that they can handle the details of your job. Cross-training is an exercise that has only positive effects.

You may also create online tutorials for areas of your job for which you have no backup. If you are a subject librarian, you might create online instruction modules for various databases using software such as Adobe Acrobat Connect Pro. I created a virtual tour of our library for patrons to use, since I knew I would be unavailable for in-person tours at the beginning of the semester. Finally, make sure your public online documentation, such as research guides and collection development policies, is accurate and up to date.

## **RECORD RELEVANT PASSWORDS AND CONTACT INFORMATION**

If your backups need to know various computer passwords or other numbers, include those in the manual. As I was preparing for a leave of absence, our security gates occasionally malfunctioned, so I included the phone number to call and the serial numbers of the gates in my manual. You can hide your manual in a password-protected wiki so only authorized people can see it. Also be sure to include the contact information for all of your backups as well as your home or cell phone number. Distribute the link and password to your manual to your supervisors, appropriate employees, and anyone else you think may need it. In the end, this will likely mean fewer phone

calls to you at home, and you will be free to concentrate on nonwork issues. Finally, be sure to revisit your manual once a year to make sure it is up to date, in the event that you are unexpectedly called away from your job.

Creating a manual for my job duties has been extremely useful. My manual was used successfully during my two maternity leaves and continues to be used now that I am on an academic year appointment and out of the office for three months a year. The process of writing the manual helped me better organize my job procedures. By letting my colleagues handle various tasks, I am able to leave the office for extended periods and not be overwhelmed with outstanding work on my return. In a challenging economy when management may be unable to hire temporary librarians, manual documentation and cross-training are budget-friendly ways to handle long- or short-term leaves. Manual writing is also an excellent way to pass on best practices and institutional memory after you retire. Whether you are new to your career or ready to retire, having a manual for your library contributions will endear you to your colleagues and management.

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### 3

## HOW TO MANAGE SERVING STUDENTS OF GENERATIONAL POVERTY

*Kris Baughman and Rebecca Marcum Parker*

**SERVING STUDENTS** of generational poverty as a school librarian is rewarding as well as challenging, especially during a recession. In addition to giving students library and information technology skills, you can teach them many of the societal norms other students are already equipped with when they come to school. School and reading may not be a priority at home if paying the gas bill and keeping food on the table are daily concerns for parents.

### BEHAVIOR MANAGEMENT

Students from a generational poverty background need clear expectations, examples of excellence, and consistent structure. At the beginning of each school year, and if your population is transient at the beginning of the second semester, review your expectations. Have them posted clearly in the library, and word them in a positive way. Be sure to follow them yourself. It is important to talk to students in the voice of

an equal—many of them may be running households and raising siblings at home, and they are accustomed to having an adult role. Model expectations and praise students who exhibit positive behaviors. Explain that every place has rules, and that knowing those expectations is part of being successful. Create relationships with the students that show them you have an interest in them. This entices them to follow your lead. Use humor when possible—lessons and skills stick when laughter is part of the memory of learning them. Expect to have to teach and model even the most basic expectations. Teach students that they control what happens to them via good choices and otherwise. Here are examples of good expectations to post and use:

- “*Respect others.*” Explain that we must treat others as we want to be treated. I always address the students as “ladies” and “gentlemen” to create the expectation that they will behave well.
- “*Listen carefully and follow the directions.*” Explain that this means hearing and doing what you ask.
- “*Ask questions when you don’t understand.*” Be sure students know you are serious about this, because you need to find out if you should start a unit with more fundamental information.
- “*Take care of all library materials, furniture, and equipment.*” Give specific examples and model what this looks like.
- “*Use a right-size, indoor voice.*” Model this for the students; in many generational poverty homes volume equals power.

## RELATIONSHIPS WITH PARENTS AND GUARDIANS

Adults in generational poverty situations are stretched in many different directions. During a recession, services and charitable funds are less available than in better times. Many parents may be working more than one job and may have limited time available to aid their children. Also, many adults in generational poverty did not have successful school careers and may be leery of talking to school staff. Consider these approaches and ideas:

- Help parents feel at ease. Gear your language choices to what will be easiest to understand, and listen carefully to responses in order to adjust, if necessary.
- If time permits, try to meet parents early in the year to establish the start of a positive relationship.
- Tell parents about your positive observations of their child first, especially if you have a concern.
- Use teamwork language, and reaffirm how much they have to offer in working with their child.
- If they feel that any particular challenge makes them less capable of helping their child, tell them of your own parenting challenges and concerns, if possible.

## CHECKING OUT LIBRARY BOOKS

Generational poverty students may not have experienced the best library situations, since such students tend to be migratory and in environments that may not offer consistency. Consequently, these students may have had challenges in the past returning library books. The big lesson that helps students is learning to take responsibility for and communicating about mistakes.

- Have students and parents sign a library contract that covers book care and responsibility, including your library expectations. Write the contract using simple language in case a parent is challenged by reading. Offer translations, if necessary.
- Let students know that there is a solution to every problem. Tell them that situations resolve in a more positive way when they let you know about books lost during evictions, other transitions, or other problems. Do extensive role playing to show students how to communicate this way.
- Keep open lines of communications with classroom teachers so that you learn of challenges students are facing.
- Consider, if the budget permits, forgiving books lost due to circumstances beyond the student's control, such as an eviction, or allowing students to donate a book to "pay for" a lost book. Tell students that you will forgive the book loss on the condition that, if they ever get the book back, they will return it to the library.
- Allow students with lost books to check out additional books on a "payment plan." Any time a student with lost books wants to check a book out, ask that he or she pay at least fifty cents toward the lost book(s). If your budget allows, forgive the rest of the cost of the book at the end of the year if the student has made at least five payments, or a number you determine.
- Be willing to advocate at the public library for students with lost public library books, and offer public library book return services to students. Public libraries have become more flexible, and many forgive fines and work with families regarding lost books.

## COLLECTION MANAGEMENT

Many libraries are underfunded, especially during a recession. In addition to the standard sources of funding, such as school moneys and book fair proceeds, consider these options:

- Shamelessly plead for donations of goods and services from merchants, especially bookstores. Widen your circle to include businesses outside of your school neighborhood or district; business persons in suburban areas often say they have not been approached by any school before. Most offer something

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# ASSURE-ING YOUR COLLECTION

*Roxanne Myers Spencer and Barbara Fiehn*

**THE ASSURE** model of instructional design provides a collection management framework. This model is flexible enough to be adapted for all libraries. As a goal-based model, it provides direction for all functions and levels of staff.

ASSURE is an acronym for an instructional design model used for developing and refining instruction.<sup>1</sup> Each letter represents a task in planning for instruction:

## *ASSURE Model*

Analyze learners

State learning objectives

Select methods, media, and materials

Utilize methods, media, and materials

Require learner participation

Evaluate and revise

Taking an instructional design model out of its original context and applying it to library collection management may seem odd, but it is worth exploring. ASSURE can provide a workable structure for building, analyzing, evaluating, and maintaining library collections:

## *ASSURE Adapted to Collection Management*

Analyze users

State collection objectives

Select methods, media, materials, or format

Utilize selection and deselection methods, media, materials, or format

Recruit library participation

Evaluate and revise regularly

## **ASSURE FOR COLLECTION MANAGEMENT: Step by Step**

### **Analyze Users**

Despite the familiarity that develops between staff and frequent patrons, library users are not a constant population. Viewed in a collection management context, librarians should consider general user characteristics as well as the specific or unique aspects of user populations: What language or literacy barriers exist? How popular is fiction versus nonfiction? Among student populations, which materials are most popular? Other considerations are learning styles, popular formats, and leisure tastes.

Establishing thumbnail overviews of library patrons can provide helpful information on evolving library clientele. Use on-site or virtual suggestion boxes, exit surveys, or one-question queries. Formal community surveys require planning and encumber funds and staff time. Analyzing current and potential users assures that dollars are spent effectively.

### **State Collection Objectives**

As library communities change, collection requirements change. Keeping pace with technology, formats, and patron preferences is an ever-present challenge. Stating collection objectives clarifies the library's mission and services on the basis of an understanding of the library's users. It also provides focus for staff who are selecting materials. Objectives can be measured and flexible and should be reexamined periodically. Alignment between goals and users reduces purchase errors.

Collection mapping—examining and evaluating the collection—helps librarians assess where the collection is weak or does not meet patron needs.<sup>2</sup> When time is short, utilize readily available data, such as in-house use and circulation statistics, to guide evaluation and selection processes.<sup>3</sup>

### **Select Methods, Media, Materials, or Format**

New librarians can be overwhelmed by the multitude of selection resources. Selectors are bombarded by publisher offerings, patron requests, and recommendations in a multiplicity of formats and prices. No collection budget can keep up with the demand or hype associated with the next big title or format. Libraries face an increasingly complex set of demands for delivery of new materials. Devising an inclusive selection process is an opportunity to increase the library's visibility.

Support for literacy and learning styles applies to all library collections. Librarians can provide literacy support by addressing learning styles and exploring new formats and media.

Academic librarians will be familiar with the Research Libraries Group's system of five collection levels.<sup>4</sup> These levels, simplified and adapted below, can be used by most libraries to address selection scope:

### *Simplified RLG Selection Scope*

- 0 Out of: Library does not collect at this level; no materials are purchased on this subject.
- 1 Minimal level: Basic works in a subject only.
- 2 Basic information level: Up-to-date information that introduces a subject and expands to provide information on the variety of topics.
- 3 Comprehensive level: Special collections address collecting local history, authors, etc.

### **Utilize Selection and Weeding Methods, Media, Materials, or Format**

All libraries benefit from utilizing varied services and media. Topical book talks, reading clubs, licensed movie performances, and traveling exhibitions may help bring in new patrons. The impact of displays cannot be underestimated in boosting library circulation. An experiment at the Lafayette (Colorado) Public Library showed an increase in circulation of fiction titles by 90 percent and nonfiction by 25 percent when selected duplicate titles were displayed.<sup>5</sup>

The bookstore model of library layout has been a popular template because of the emphasis on higher visibility of materials. This model can be adapted even when extensive remodeling is not an option.

### **Recruit Library Participation**

In the original ASSURE model, this step is “require learner participation.” Our adaptation is “recruit library participation.” This is particularly important to solo librarians. Address this step by engaging the community. To encourage active participation, recruit Friends groups, students, parents, teachers, and other community members for tasks, such as creating displays or monitoring local newspaper reviews, that do not require specialized library training.

### **Evaluate and Revise**

Continuous evaluation and revision are essential. Assess the model through periodic examination of the processes and procedures:

- Maintain logs: Keep running lists of concerns and issues that arise.
- Chart successes: Gain feedback from staff and patrons via surveys, spot interviews, suggestion boxes, or intranet blogs.
- Check circulation statistics and reference logs for changes in library use patterns.
- Review the six ASSURE steps monthly and modify as needed.

The six steps of the ASSURE model create an organized system for collection management. Each step can be followed by solo librarians or libraries with staff, providing a flexible structure for examining and developing standardized tasks. The ASSURE model provides each participant with clear direction and opportunities to contribute to building and maintaining a useful library collection.

### Selected Resources

American Library Association. 2009. ALA library fact sheet 7: Video and copyright. [www.lita.org/ala/professionalresources/libfactsheets/alalibraryfactsheet07.cfm](http://www.lita.org/ala/professionalresources/libfactsheets/alalibraryfactsheet07.cfm).

Bradburn, Frances Bryant. 1999. *Output Measures for School Library Media Programs*. New York: Neal-Schuman.

User-friendly and useful how-to book about gathering and using evaluation data.

Burgett, James, John Haar, and Linda L. Phillips. 2004. *Collaborative Collection Development: A Practical Guide for Your Library*. Chicago: American Library Association.

Theoretical principles along with real-world strategies for developing collaborative work.

Laughlin, Sara. 2003. *The Library's Continuous Improvement Field Book: 29 Ready-to-Use Tools*. Chicago: American Library Association.

This guide applies quality management concepts to make library processes more effective.

Rubin, Rhea Joyce. 2005. *Demonstrating Results: Using Outcome Measurement in Your Library*. Chicago: American Library Association

An information-gathering toolkit to provide a higher, more responsive level of service.

### Notes

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2. David V. Loertscher. "Collection Mapping: An Evaluation Strategy for Collection Development," *Drexel Library Quarterly* 21, no. 2 (1985): 9–21.
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4. Library of Congress, *Cataloging and Acquisitions: Collecting Levels*, [www.loc.gov/acq/devpol/cpc.html](http://www.loc.gov/acq/devpol/cpc.html).
5. Michele Seipp, Sandra Lindberg, and Keith Curry Lance, "Book Displays Increase Fiction Circulation over 90%, Non-Fiction Circulation 25%," *Fast Facts: Recent Statistics from the Library Research Service*, no. 184 (2002).

# BILLY CLUB: A MODEL FOR DEALING WITH UNRETURNED LIBRARY MATERIALS

*Suzann Holland*

**THE FAILURE** to return library materials constitutes theft of municipal property. Should you fail to deal with it aggressively, you encourage more of the same. Remember that the core mission of a library is to provide access to information. If one patron is allowed to retain materials permanently, every other patron is denied access to those materials until they are replaced. Replacing unreturned materials means less money for additional and newer materials for the patrons; the overall quality of the collection goes down as a result of the actions of a few. Do not allow scofflaws that much control over library operations. Whether or not you choose to utilize the Billy Club model presented below, do something.

## PRELIMINARY ACTIONS

Begin your materials recovery program with the understanding that this is a time-consuming process. Time spent on the Billy Club process must be regular—a sporadic effort is not as effective and leads to wasted resources. Depending on the size of your library, you may choose to handle all aspects of the program personally or to delegate part of it to others. Try to limit the number of parties involved to avoid confusion.

Research the law that applies to your library. Most states address the theft of library materials within the code. You may also have a relevant municipal ordinance. If no specific law regarding library materials is on the books, it can still be considered a criminal matter under the standard theft laws.

With a copy of the applicable law in hand, find a partner organization. Typically, you will work with either the police or the county attorney's office. Try to set up a meeting that includes a representative of each potential entity. To avoid that "police looking for an overdue book" assumption, make it clear that the program is intended for serious cases. Let potential partner organizations offer input and suggestions.

Once you have secured the tentative cooperation of law enforcement, create a draft policy to take to the library board. You may create an entirely new policy, or perhaps you will amend an existing one with a new section. The policy should clearly lay out the scope of the program. Include the following:

- *Minimum for legal action.* This might be a dollar amount of value or perhaps a certain number of items. If the items in question fall below the minimum, deal with them quickly and bill the patron's card.

- *How to handle minors.* At what age will you contact a minor directly rather than the parents? Get professional advice from your city or county attorney on this. You do not want to send dunning letters to a 6-year-old child or to the parents of a 17-year-old teenager. Confidentiality is also a major factor.
- *What happens afterward.* If you have to resort to law enforcement to get your materials back, will privileges be reinstated? Will the patron be charged for the associated costs, such as certified mailing expenses?

Make sure each component of the policy is in accordance with the law. For example, if your state code specifies that materials are being illegally held at 90 days past the due date, make sure your policy does not commence the materials recovery procedure at 60 days. With a board-approved policy in hand, you are ready to begin. Follow the steps noted below, adapting them for your situation. Be sure to follow the same steps with all patrons, unless you have different procedures for minors.

### **SUGGESTED STEPS AT A GLANCE**

1. Identify patrons. Refer to regularly scheduled reports to determine your Billy Club roster. For instance, if your criteria are \$100 worth of items at least 90 days overdue, get a report of patrons who meet those criteria on the first day of each month.
2. Begin tracking Billy Club patrons. You may choose to use a spreadsheet, a database, or a retro index card solution. Because there are multiple steps in the process, you need to know where each Billy Clubber is in the process. Your chosen tracking system ensures that you know what needs to be done and when to do it.
3. Send your first letter to the patron (see Sample Letter). The purpose of the initial letter is twofold: to encourage the patron to return the materials without further action, and to verify the mailing address. The letter states that the patron has ten days to return the items in question. Wait fifteen days before proceeding to step 4. If your letter is returned to sender, go directly to step 6.
4. Send a certified letter with a return receipt to the patron. You will be able to prove later that the patron received the letter and failed to act on it. Check the law in your state; some require that the restricted delivery option be used. This letter is exactly the same as the original letter but is dated later. Wait fifteen days before proceeding to step 5.
5. Write the materials off. Alter the records as needed in your system so the missing items are not checked in if later returned. Either reorder or delete each item. They cannot be returned in lieu of payment from this point forward.

6. Turn the matter over to law enforcement with supporting documentation: copies of all mailed letters, including any returned mail; identifying information about the patron in question, such as a driver's license number; and itemization of unreturned items including titles, due dates, and replacement costs.
7. Refer affected patrons to partner organization if they call. The matter is out of your hands. If the patron offers to pay in full, take the money and provide a receipt stapled to your business card. The patron will need to deal with the partner organization.

---

## SAMPLE LETTER

Dear Patron:

I am writing to inform you that you have 10 days from the receipt of this letter to return the following materials in good condition to the Anytown Public Library:

DVD—*Harry Potter and the Sorcerer's Stone*, due 2/16/2009

Book on CD—*Going Rogue*, due 2/13/2009

Book—*The Appeal*, due 2/13/2009

Alternatively, you may pay the full replacement costs due for these items, in the amount of \$83.91.

If you do not resolve this matter within the time specified above, be advised that this will be reported to the police as a theft.

Celeste Collins, Director

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## ADDITIONAL TIPS

Any of the following tips may be applicable in your situation:

- Hold the patron responsible for an entire multipart item if the checked-out item cannot be replaced individually. For example, if a patron checks out a single disc of *Desperate Housewives: The Complete First Season*, charge the replacement cost for the whole season.
- Find as many ways to automate the process as you can. Letter templates, labels, a good tracking system—they are important tools.
- Consider photocopying a photo ID as a part of the card registration procedure.

- Add wording to your card application that notifies the patron of the law; try something like “I understand that failure to return library materials within 90 days of the due date constitutes theft under Iowa law.”
- If a patron requests a payment plan, put it in writing with both a schedule and the patron’s signature. Include wording that the plan must be followed or the issue will become a matter for the partner organization.
- Accept only cash payment in full if the patron comes to you after being contacted by the partner organization.

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## COLLABORATION FOR LIBRARY COLLECTION ACQUISITION

*Lorette S. J. Weldon*

**THIS “HOW-TO”** chapter can help you develop an acquisitions program that feeds documents and other items into a library collection. Through carefully defined teamwork and collaboration within the library’s staff and with other organizations, this method convenes different groups and individuals for information exchange, identifies the big issues, and provides valuable, different perspectives on them.

### WHAT ARE THEY THINKING?

Begin by sending out a feedback survey to find out if the patrons want more that your collection contains. This allows patrons to tell you if they have received information or documents that answered their questions. The survey functions as a tool to help you identify relevant documents that reflect current and future interests of the patrons for the collection.

When I applied this program in my library, I used open-ended questions so that patrons were freer to respond. If the questions allow for more of a response than “yes” or “no,” patrons can take better advantage of the chance to be heard. Patrons do realize that this will help them with future research needs. The following are the process and basic questions that helped me get a better picture of what the patrons wanted:

1. Create a survey through Survey Monkey ([www.surveymonkey.com](http://www.surveymonkey.com)).
2. Select the participants from the membership and send them surveys; or create e-mail messages to them with a link to electronic versions of the survey.

3. Receive responses and catalog the open-ended responses by answering the following questions:
  - *What* is happening?
  - *How* did X or Y answer the question?
  - *Who* answered the question?
  - *Where* did the request get answered (e-mail, phone, etc)?
  - *When* did it happen?

## SAMPLE SURVEY

Your survey will benefit from questions such as the following, but adapt them to suit your own library situation:

1. Before responding to this survey, were you aware of the existence of the library?
2. Have you personally used the services of the library or had someone else use the services of the library on your behalf?
3. How did you contact the library to ask for research help?
4. Were you able to obtain the information you were seeking?
5. I am aware that the library offers [answer yes or no]
  - webinars for patrons on a range of topics
  - a librarian who answers questions about a range of topics
  - an online library for sharing documents
6. Do you have documents that you are willing to share with the library collection? [answer yes or no]
7. Do you find the discussion list helpful?
8. List three things the library typically does very well.
9. List three things the library could do much better.

## GO BACK HOME

Another way to find out what the collection lacks in terms of patron requests is to have an informal retreat with the researchers on staff in your library. I found that through biweekly lunchtime retreats I could recruit members for a special team who could contribute past, present, and future “lived experiences” of staff in the research study areas of the library. This kind of team can help you assess the library for missing elements related to their area of study.

Each member of the team is tasked to produce their findings in a concisely written, short brief. The results can be matched across several library collections in your area (location and subject specialty), including private, government, academic, and information industry sectors.

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# MILLENNIALS, GEN-X, GEN-Y, AND BOOMERS, OH MY! MANAGING MULTIPLE GENERATIONS IN THE LIBRARY

*Colleen S. Harris*

**CREATING COHESIVE** teams and committees that capitalize on the strengths of the age diversity in libraries is both challenging and essential to the long-term success of the library and institution as a whole. Today's libraries have as many as four generations working within them, each with their own unique work styles and worldviews: veterans, baby boomers, Gen-X, and Gen-Y, or Millennials. Knowing the characteristics of each generation brings some insight into the best ways to manage multiple generations in your unit to create dynamic synergies, learning opportunities, and team-building activities and to ensure effective project completion.

## TYPECASTING THE GENERATIONS

Individuals inevitably deviate from wide generalizations, but there are characteristic work styles for each generations. Knowing these descriptions, broad as they may be, can help you manage your staff more effectively.

*Veterans* (b. 1900–1945). As a group, veteran workers generally enjoy structure, abide by the rules, and are most comfortable with conformity and a top-down management style. Largely motivated by verbal or written recognition, awards, and public acknowledgment of success, they are considered the most “loyal” and least likely to switch jobs of the various generations. Veteran workers are also the most likely to prefer to be an expert in their job function rather than a “jack of all trades.”

*Baby Boomers* (b. 1946–1964). Known to work until they drop, the boomer generation outnumbered all other generations. Master networkers, they value relationships over most other work-related values, and instead of vague recognition they prefer status symbols such as titles, raises, and other tangible benefits as rewards for a job well done.

*Generation X* (b. 1965–1979), Gen-Xers are known to be computer-savvy, skeptical of authority, and strongly preferring work/life balance in their careers. Opportunities to learn and grow are essential for Gen-Xers to be happy in the workplace, and they are likely to leave any work environment that fails to provide those challenges. This generation prefers autonomy in their work to a greater degree than previous generations.

*Generation Y/Millennials* (b. 1980–1999). The Millennials came of age during a time of technological sophistication and economic turmoil. They exhibit the greatest need to feel that they are contributing to the good of the world with their work. They want personal connections at work and for their managers to value them as individuals in addition to valuing the product of their work.

## **KNOW YOUR STAFF**

Knowing your staff members' preferred working styles not only helps you decide where to deploy them most effectively for productivity but gives you an idea of what skill-building resources you should be offering to keep them engaged and learning. Remember that memo you got from library administration about the recent licensing of self-paced software training? You might want to highlight that opportunity for your staff. Expect to hear interest from your Gen-Xers, who are known to want additional challenges. Do you know which of your staff prefer private acknowledgment of their successes and which would be touched by a thank-you card or official memo? Knowing what motivates your staff helps keep them happy. This means you have to take the time to step out from behind the desk and get to know your staff as people.

## **FOSTER COLLABORATION**

Make sure you are not allowing your staff to segregate by age group, since this reduces the advantages of a lot of synergy. Foster collaboration by consciously building teams to foster collaboration and opportunity for your staff. Your veterans will bring their expertise to the table and be consulted on library functions and processes, boomers can satisfy their need for status by being tapped as team or project leaders, Gen-Xers can broaden their skill sets by serving on several different teams, and Millennials will likely be most interested in the projects and teams they deem most valuable. If you can balance the work that needs to get done with work people truly enjoy, the entire organization benefits.

## **PEER TRAINING**

Don't forget that peer training allows your library to take advantage of staff expertise at any age. An additional benefit of peer-to-peer training is that staff members from different age groups learn how to interact, accommodate, and capitalize on their coworkers' skill sets. Acknowledging the strengths of your staff—which often fall along generational lines—provides you a strategic edge in strategic planning and team building. This means, for instance, that staff have to learn to be sensitive to the technological competency levels of their coworkers if you tap a Millennial to start offering technology training. The best way to foster appreciation of age diversity is through interaction, and with all staff involved in some capacity in training each is able to both demonstrate their skills and learn those of others.

## COMMUNICATION IS KEY

Generational differences in communication can have an effect on the entire work environment. Address misunderstandings as they arise and be careful how you communicate both your expectations and new opportunities. Focusing only on high-tech aspects of new work can alienate those less comfortable with technology, and encouraging long work days and weekend work may make younger staff members grumpy. Also, make your staff aware of how they are communicating. Do younger staff make fun of older staff for not being on the bleeding edge of technology? Do older staff frown on the casual dress of younger staff? As a manager, make your expectations of your staff clear, and address attitudes or remarks before they become inflammatory and decrease the productivity and well-being of the workplace.

## DON'T MAKE ASSUMPTIONS

Generalizations about groups of people are just that—they cannot take into account the needs and wants of individuals who fall outside the broad brushstrokes of these generational breakdowns. There are baby boomers who are early adopters of every technology you can think of, and some Millennials have yet to discover social networking tools. Some Gen-Xers are workaholics, and some veterans want to multitask and learn various work roles. Don't assume knowledge—or ignorance—of any particular skill on the basis of a person's age.

Managing with an eye toward what motivates members of different generations can give you the tools to advance your library strategically and to assign work in a manner that is both fair and consistent with the desires and goals of your staff. Managing multiple generations while challenging them in terms of their different values and desires offers the rewards of the wisdom of experience and the novel take on traditional functions and processes. The benefits of managing your multigenerational workforce well are many, including reduced staff turnover and a pleasant working environment. How are you capitalizing on the unique blend of ages in your library workforce? How are you making your library a workplace where staff of every age group feel comfortable and valued?

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# HIRING AND TRAINING GRADUATE ASSISTANTS FOR THE ACADEMIC LIBRARY

*Erin O'Toole*

**THE RESEARCH** and instructional services department of the University of North Texas Libraries employs eleven graduate assistants (GAs) to provide face-to-face and virtual reference services. Two subject librarians have developed procedures and practices that simultaneously streamline management and motivate the GAs to provide consistently professional reference service. Try these tips for hiring and training to improve your GA program.

## HIRING

When you are considering graduate students for employment, their employment histories, education record, and personalities are more important than their fields of study. Students with the following qualifications make the best employees:

- customer service or teaching experience
- passion to help people
- stability in school and employment records
- working knowledge of Microsoft Office and Web 2.0 applications
- outgoing personality

Design your interview with open-ended questions, giving applicants the opportunity to tell you their experiences. Remove jargon from interview questions and add examples of the information you seek, such as these:

- What computer software have you used, such as Microsoft Office, Photoshop, or Dreamweaver?
- Do you have experience with Facebook, Twitter, blogging, or other social networking tools?
- With which electronic library resources are you familiar? Some examples are journal article databases like EBSCOhost databases, encyclopedias, and bibliographic managers.

Many students do not read the job description carefully because they get excited at the prospect of making money. You can eliminate ill-matched applicants and reduce misunderstandings with GAs by explaining the graduate assistantship requirements

and department's expectations at the interview. Carefully review a handout of the employment conditions with the applicant. Besides salary, these are the most important facts to cover:

- number of enrollment hours required per semester
- number of work hours required per week and over the year
- requirements for evening and weekend shifts
- activities allowed during shifts
- dress code
- procedures for sick and vacation days
- frequency of paychecks
- details of benefits
- availability of summer and postgraduate employment

Encourage applicants to take the handout home, review it, and contact you with any questions. After completing a set of interviews, wait at least two days before offering a position to allow the applicants time to consider whether the job suits them.

## ORIENTATION

Orientation is the time to start motivating GAs to provide excellent reference service by giving them the overall picture of your library system, explaining their vital place in it, and making them feel welcome. Spend about twenty training hours off-desk and include the following activities to promote inclusion:

- Show GAs the locations of restrooms, mailboxes, staff lounge, and lockers.
- Introduce GAs to the department staff.
- Introduce GAs to the administrative assistant who handles timesheet and payroll issues.
- Teach GAs how to use the time clock software.
- Arrange for GAs to visit with an IT employee to learn computer applications and authentication procedures.
- Tour other departments in the library and introduce GAs to staff.
- Give GAs cheat sheets to help them remember the names of library employees.
- Place pictures and welcoming articles about new GAs in your library newsletter.

Spend the remaining time discussing library policies, procedures, and resources. A wiki on the library's intranet is a convenient place to store this information because

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## NO JARGON

*Even if applicants are library and information science students, do not expect them to recognize library jargon in interview questions. When training GAs, be careful to explain any jargon, because they generally will not tell you when they are confused.*

it can be updated quickly when policies and resources change and accessed easily by anyone in the organization. Create sample patron questions that require GAs to locate the following policies and procedures on the library website:

- services and policies for reference, reserves, circulation, and interlibrary loan
- library hours and calendar
- library building and collection locations
- emergency procedures

New GAs can do resource training independently with tutorials, sample questions, and answer keys that you have stored in a wiki. Be sure to follow up with GAs after the completion of each worksheet and check for comprehension. Academic libraries have more resources than GAs can learn during orientation, so prepare training materials for representative resources:

- FAQs about books and journal articles
- databases with thesauri
- databases from different vendors
- databases with special functions, such as Web of Science
- multidisciplinary reference resources

One of the most difficult resources for GAs to master is the online catalog. Most are not prepared for the intricacies of cataloging. Some features that confuse them are unusual status codes, multiple entries for different formats, and Continuing and Continued By records for periodicals that have changed titles.

## ONGOING TRAINING

After orientation, continue training GAs at weekly meetings of one to two hours during the academic year to keep them current on news about university, library, and resource changes. Bring in different presenters from your library and incorporate active learning to keep them interested in the following activities:

- training in multidisciplinary and subject-specific resources
- training in communication and web development software
- training in instructional methods
- practicing resource presentations
- touring library departments
- role playing of reference skills

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### MAKE A HANDOUT

*Whenever you find yourself explaining or recording information for GAs more than twice, make a form or handout. The initial outlay of time and labor is worth the time saved later and the resulting management consistency.*

## COMMUNICATION

Communication is daily training. GAs need information every day in order to offer outstanding service. Use several modes of communication for different functions: e-mail, wikis, and instant messaging.

Train GAs to check their e-mail on a daily basis, even if they are not scheduled to work. E-mail is the best mode for handling individual issues, such as scheduling conflicts, vacation days, or anything else that requires a personal response. It is also appropriate for sending out deadlines or projects to the entire team.

A wiki is an appropriate tool for pushing information out to GAs and librarians working reference shifts. It is faster for staff to open a wiki page at the shift's start and find reference information there than to sift through individual e-mail for answers. Additionally, all reference staff can add information to these suggested wiki pages:

- reference news—daily events and changes
- class assignments FAQs
- technology and equipment FAQs
- stumpers—unusual reference questions and their answers

Use instant messaging to maintain an open line of communication with GAs who are working reference shifts. GAs can contact librarians about difficult reference questions, desk coverage, problem patrons, and other time-sensitive matters.

You can have a team of enthusiastic, high-performing GAs at your library by following the tips described in this chapter for hiring and training. They will be motivated and loyal because you included them in the library organization, prepared them to do professional reference work, and supported them with multiple modes of communication. The GAs will develop into first-rate future librarians, possibly for your own library.

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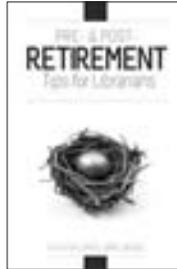
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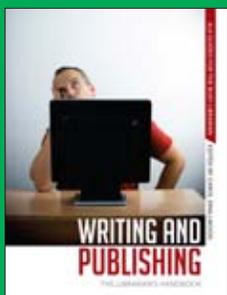
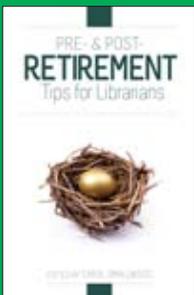
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