

Policy Building Blocks: A Step-by-Step Approach

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Building Policies – Getting Started

Do I need a Policy?

- Am I solving or preventing a problem?
- Is changing procedure insufficient to address the problem?
- Is there a legal need for this policy?

If you can't answer yes to all of these questions, you probably don't need a policy.

Building Policies – Getting Started

Do I need a Policy?

Policy:

- Provides loose guidelines
- Requires board approval
- Ties managements hands

Procedure:

- Provides detailed steps
- Set by management
- Flexible for management

Good vs Bad Policies

Good

- Flexible
- Specific
- Inclusiveness
- Clear language
- Applicable/relevant
- Actionable
- Legally compliant

Bad

- Complicated
- Vague or overly specific
- Poorly worded
- Fancy language/big words

Building Policies – Step 1

Assembling a Draft

- Borrow from Peers – Direct or Web Search
- Use AI
- Let Your Attorney Write It

Building Policies – Step 2

Identify & Involve Stakeholders

- Staff
- Board Members
- Friends of the Library
- Attorney

Building Policies – Step 2

Identify & Involve Stakeholders

- Staff feedback (if appropriate)
 - Remember that staff see what you cannot
 - Don't limit feedback to just your managers
- Board feedback
 - They represent your citizens and communities
 - They could be liable for problems created by policies or the lack thereof

Building Policies – Step 3

Legal Review

- State Statutes & Constitution
 - Open Meeting & Record Acts
 - Public Bidding Act
 - Library user privacy statute
- United States Constitution
 - First Amendment – Free speech
 - Fourteenth Amendment – Due Process

Building Policies – Step 4

Sharing the Final Policy

- Intentionally roll it out to staff
- Consider posting on the library website
- Post necessary policies publically
- Backup your original policy files

Building Policies – Step 5

Updating Policies

- Create a policy review calendar
 - Every policy needs a review at least 3-4 years
 - Some policies need annual review
- If you see a policy isn't working, don't wait for the review calendar
- If the policy isn't need it, rescind it

The background features a white central area with abstract, light gray geometric shapes (polygons and triangles) scattered across it. A solid blue horizontal bar is at the top, and a blue curved shape is at the bottom.

Thank you

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