

New Library Director Checklist

Financial Issues

1. What process does your library system use to develop and manage its budget?
2. What standard policies and procedures do you use to manage library finances?
3. Does the library have any purchasing cards, and who has access to them?
4. What subscriptions, memberships, or other recurring expenses does the library have? When are their renewal dates?
5. Does your library comply with State Aid requirements? [What are the State Aid Requirements and who do you contact for more information?](#)
6. How do you raise funds and solicit donations for the library?
7. Does your library [apply for E-Rate?](#) If so, what is the process?
8. What types of [LSTA grants are available through the State Library?](#)
 - o Are there any grant applications or grant-funded projects in process?

Planning and the Community

1. What are the dates of your long-range plan?
 - o How do you develop the plan?
2. Are you required to provide a library annual report?
 - o How is it developed?
 - o Who do you share it with each year?
3. What are the [South Carolina Public Library Standards?](#)
4. What are some of the best ways for you to learn about your community?
 - o What groups or individuals should you meet with?
 - o What groups or agencies is the library currently partnering with?
5. What kind of technology planning do you do in your library?

Library Policies

1. What is the library's collection development policy? When was it last updated?
2. What are your Internet services, policies and access procedures?
3. What is your library's confidentiality policy?
 - a. How do you train staff and volunteers to follow the policy?
4. What is your patron behavior policy?
 - a. How do you train staff and volunteers to follow the policy?
 - b. What security measures do you have related to patron behavior (security cameras, guards, etc)
 - c. What is your incident reporting system?

Public Library System, SCLENDS, State Library

1. What documents and/or ordinances established your library system?
 - a. How do they outline your responsibilities?
2. If your library has a regional agreement, what does it cover?
 - a. Does it need to be re-negotiated? If so, when?
3. If you are a member of a regional system, who is responsible for what within the system?
4. What, if any, consortia is your library a part of?
5. If you are in a regional system, how do you communicate and work together for the benefit of the whole system?
6. What is your library's interlibrary loan policy?
7. [Is your library a part of SCLENDS?](#)
8. How does your staff access [continuing education](#)?
9. What types of [consulting services](#) are provided by the State Library?
10. Where can I find [statistics about my library, and other libraries in the State, compiled by the State Library](#)?
11. How can I get [news and announcements](#) about library-related events?

Legal Issues

1. [What are the key South Carolina laws that impact your library?](#)
 - o Confidentiality, Sunshine Law, State Aid Legislation, Public Records, etc.
2. Does your county have specific ordinances that deal with the library system?
3. How does your library comply with the [Americans With Disabilities Act](#)?
4. Do you know the [records retention schedules](#) (state and county) for your paperwork?

Personnel and Employment Issues

1. How is the library's personnel handled within the library and county or city government?
2. Who makes personnel policies in your system?
3. Do you have an employee handbook that your staff can freely access?
4. Where are the position descriptions and performance evaluation records for current staff?

Other Issues

1. Who owns and is responsible for maintaining your library building?
 - o Where is a set of building plans?

2. Who maintains your technology? What technology management programs do you have (Envisionware, etc)?
3. How does your library market services?
 - Is someone in charge of marketing?
4. What is the role of your Friends group or groups?
 - Who works with their leadership?
5. Do you have a Foundation? If so, what is their role?
6. What is the makeup of your library board?
 - How often does it meet?
 - Where are the bylaws? When were they last updated?
7. Who are your County Council members? When do they meet?
8. Who are the state legislators for your region? What is their stance on library-related issues?