**Crafting and Maintaining Effective Patron Policies for Community Success Learner Guide**

<https://www.webjunction.org/events/webjunction/crafting-and-maintaining-effective-patron-policies.html>

Effective library policies are essential for setting clear expectations, defining responsibilities, and establishing boundaries for both patrons and staff. This session will cover the ten most common patron-facing policies and offer guidance on selecting and tailoring them to meet your library and community needs for safe and effective operation. Using a Code of Conduct policy as an example, we’ll discuss how to avoid policies driven by trauma or drama, ensuring they are clear, accessible, and enforceable. Additionally, we’ll explore best practices for policy management, including the importance of regular reviews by directors, boards, and staff, to maintain accountability and relevance.

Presented by: Robin Newell

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| **What are your personal and team goals for viewing this webinar?** |
| **Personal Goals** |  |
| **Team Goals** |  |
| **Policy inventory** |
| Library policies can be daunting to tackle, whether you’re new to your job, or a veteran. You may have a binder filled with policies that have never been reviewed, or perhaps you’re missing some key policies critical to successful library operations. **Conduct an inventory** of your library’s policies and list those patron-facing policies you currently have. How old are they? What’s missing? What’s essential? What’s desirable? Are they accessible and enforceable? Do they include all the recommended components (library name, policy name, date approved) and are they consistent in format (page numbers, fonts, formatting)?  |
| **Prioritizing policy updates** |
| In the webinar, you heard key components of these top **10 patron-facing policies**. Identify those you would like to prioritize as you review and explore possible updates. Consider when they were last updated and how you can improve them to make them more clear, accessible and communicated to all experiences, and easily enforceable. (Note those policies mandated by your system, region, or state, and consider ways you might align additional policies your library creates locally.)* Intellectual Freedom
* Code Of Conduct
* Collection development
* Internet use (including internet privacy and safety)
* Children's Internet Protection Act (CIPA)
* Budget and finance
* Facilities (including meeting room use if applicable)
* Confidentiality of patron & library records
* Gifts, memorials, and gift-in-kind donations
* Public Services (including circulation and customer service)
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| **Improving your current policy process** |
| **Consider/discuss your current processes** related to policy creation to ensure you are applying the better practices shared in the webinar. Who is involved in policy creation and how? (Drafting, gathering input, revising, approving)* Director:
* Library staff:
* Board/Trustees:
* Community:

Consider your If you have a policy committee, how might you improve and align the committee process? Consider representation and accountability of committee members. |
| **Don’t reinvent the wheel!** |
| Remember to explore all the resources you have available to you to support your policy processes. Explore the resources shared on the webinar page to research sample policies and processes, including:* Contact your state library
* Find other public libraries in your area, or those in communities similar to yours, and consider contacting the library with your questions about effective policy creation.
* Review the [*Positions and Public Policy Statements*](https://www.ala.org/aboutala/governance/policymanual)approved by the Council of the American Library Association.
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| **Action Plan: (include next steps, who, when, etc.)** |
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