

Transition Notebook for the [LIBRARY NAME] Library

Library Director [NAME OF LEAVING LIBRARIAN] created this notebook [MONTH AND YEAR OF MOST RECENT UPDATE] by for the person who will be the new library director. This notebook passes on information needed to run the library.

Library administration

1. Does the library have a job description for the librarian? If yes, where is it located?
2. Where can you find information about the responsibilities of librarians and trustees?
3. Where is a copy of the library's policies?
4. When was the last time the library board and librarian reviewed those policies?
5. Does the library have a mission statement? If yes, what is it?
6. Does the library have written goals or a strategic plan? If yes, where is a copy?
7. What reports are required monthly, quarterly, and annually and who will provide help with these forms?

• Monthly Report to the library board	Monthly	Library board
• Federal, Soc. Sec., Medicare taxes.	Monthly (15 th)	NCKLS
• KW-5 State Tax Withholding	Monthly (15 th)	NCKLS
• KPERS Optional Group Life Report	Monthly.(30 th)	NCKLS
• Distribute 1099 Forms	Jan. 31	NCKLS
• System Grant Application	Jan.	NCKLS
• State Library Statistical Report	Jan.-Feb.	State Library (Haxton),
• W-4 Withholding Forms	Jan. 31	IRS
• Postage Reimbursement Forms	Dec. 31	NCKLS (ILL)
• KPERS Annual Report of Contributions	Jan.	KPERS

- Summer Library Program Evaluation Aug. NCKLS
- 941 Employer Quarterly Federal Tax Return Quar.
- KCNS-1001 Quarterly Wage Report and
Unemployment Tax Return Quar.
- KPERS Electronic Funds Transfer Jan.
- KW-3 Feb. 28 State
- W-3 at Social Security Administration Feb. 28

8. Where can you find information about Kansas library law?
9. What is the URL of your library's Web site?
10. Who is responsible for keeping the Web site up-to-date?
11. Does the library have a disaster plan? If yes, where is a copy?
12. Where is a history of the library?
13. Check the service level of your library.

- _____ Major Resource Library I
- _____ Major Service Center II
- _____ Major Service Center I
- _____ Service Center
- _____ Linking Library
- _____ Gateway Library

Library board

14. Where is a copy of the library's policies located?
15. Does the board have by-laws?
16. When does the library board regularly meet (i.e., week of the month, day of the month, hour)?

17. What information does the board want in the librarian’s monthly report?

18. What are the names of all board members and when do their terms expire?

Board member name		Term expires
_____	President	_____
_____	Vice-President	_____
_____	Secretary	_____
_____	Treasurer	_____
_____		_____
_____		_____
_____		_____

19. How long does state law allow board members to serve?

20. How are new board members for your library appointed?

21. Is the library treasurer bonded?

22. Does the librarian and board have liability insurance?

23. Where are the written rules about the Open Meetings Act?

24. Where are past board minutes and treasurer's reports are kept?

25. Does the library board evaluate the librarian each year? If so, what criteria do they use?

26. What positive tips about working with the library board would you pass on to the new library director?

Library finances

- 27. Where is a copy of your library's latest budget?
- 28. Who do you ask to find out the mill levy for the library?
- 29. What are the sources of the library's income and how much did each source provide last year?
- 30. Where are the written requirements for receiving state aid?
- 31. Where are the written requirements for receiving NCKLS' system grants?
- 32. If the library applies for E-rate each year, who fills out the required forms. What is the library's "entity number"? What are the SPIN numbers of your current telephone vendor and your current Internet provider?
- 33. Name five organizations that have given grants to the library during the past 5 years?

- 34. Name five people who have given substantial money, time, donations, etc. to the library during the past 5 years?

35. Which bank(s) has/have the library's:
- Checking account(s)? _____
- Savings account(s)? _____
- Capital improvement fund? _____
- Investments? _____
36. Who writes checks for the library?
37. Who signs these checks?
38. Who is responsible for payroll?
39. What employee benefits do library staff members receive?
40. Who reconciles the monthly bank statements?
41. Who is responsible for financial reports?
42. Who audits the library's financial accounts?
43. Where are the library's tax exemption certificates?
44. What is the library's FEIN (federal ID number) number?
45. Does the library have a postal machine for stamping outgoing mail? If yes, how is postage added to the machine?

Library building

46. Where are all the light switches and main circuits?
47. Where is the thermostat?
48. Where are the heating and return vents?
49. Where are the fire extinguishers?
50. Where are the emergency exits?
51. Where are the breaker boxes/fuses?
52. Where is the water-heater?
53. Where is the main water shut-off? Who can shut it off?
54. Where are the library's flashlights kept?
55. Where are the emergency numbers kept?
56. Where do patrons go when the tornado-warning siren sounds?
57. Who has keys to the library?
58. Where are library keys stored?
59. Who cleans the library?
60. Who is the building maintenance person?
61. Who changes light bulbs?

62. Who replaces toilet paper?
63. Who removes trash, sweeps and vacuums the library?
64. Who unstops toilets?
65. Who mows the lawn?
66. Who removes snow from sidewalks and parking lots?
67. Who does the library's pest control?
68. Who is the library's insurance with?
69. Where are the library's insurance policies?
70. Is the library insured for replacement costs or mere current worth of materials?
71. When was the last insurance inventory taken?
72. What are the worst problems with the current library building?

Library collection

73. Below is a list of all library collections, location in library, and checkout period.
- **Location in library:** Use short phrases suggesting where to look, such as “Shelves along North wall”, “Cabinet in back of library”, or “Shelves on east side of children’s area .”
 - **Checkout:** Use “3 wks” for “3 weeks”. Use “NC” for items that are “non-circulating”.

Name of collection	Location in library	Checkout
• New books	_____	_____
• Adult books		
- Fiction	_____	_____
- Non-fiction	_____	_____
- Biographies	_____	_____
- Large Print	_____	_____
• Childrens books		
- Fiction	_____	_____
- Non-fiction	_____	_____
- Biography	_____	_____
- Picture books	_____	_____
- Easy readers	_____	_____
• Young adult books	_____	_____
• Reference	_____	_____
• Audiobooks on cassette	_____	_____
• Audiobooks on CDs	_____	_____
• Videos	_____	_____
• DVDs	_____	_____
• Local history / genealogy	_____	_____
• Magazines	_____	_____
• Newspapers	_____	_____
• Microfilm	_____	_____
• Cake pans	_____	_____

- Toys _____
- Puzzles _____
- Other collections _____

74. How are items selected for the library's collections?

75. How are items purchased for the collection?

76. Where are back issues of magazines kept and for how many years back?

77. What does your library have on microfilm?

78. Approximately, how many items are received from NCKLS' rotating van each time?

Adult books _____

Children's books _____

LTP _____

79. What genres do you request from the rotating van?

80. If a patron asks for items to be removed from the collection, what is the procedure for reconsidering items in the collection?

81. When was the last inventory of the collection?

82. When was the last time the collection was weeded?

83. Where is the shelf list?

Shelf lists are the list of all items in each of the library's collections. Items in these lists are arranged as they are on the shelf, i.e., in call number order.

Call numbers are the numbers on the spine labels of books, videos, etc. Call numbers are used in library catalogs to reveal the location of books, videos, etc. in the library.

Library programs

84. What are your annual events and when do they occur?

Annual events	Date(s) of event	Person usually responsible
• Summer Library Program	_____	_____
• Story time	_____	_____
• Christmas celebration	_____	_____
• Halloween celebration	_____	_____
• Book sale	_____	_____
• Fundraiser	_____	_____
• Other events	_____	_____

Library services

85. Who can get a library card? What is required to get a library card?

86. What is done when items have not been returned by the due date?

87. What is done when items are returned late?

88. What is done when patrons claim items are lost?

89. What is done when patrons claim items have been returned, but the items can't be found in the library?

90. Does the library have a card or online catalog? If the library has an online catalog, what is the URL (i.e., Web address) for the patron side of the catalog? What is the URL, login and passwords for the staff administration of that catalog?

91. Who provides "cataloging records" for the library catalog?

92. Who handles interlibrary loan at the library?

93. Is the library a member of KICNET?
94. Who answers reference questions in the library?
95. Who in the library registers patrons for Kansas Library Cards in the library?
96. Who at NCKLS can provide blank Kansas Library Cards?

Kansas library world

97. Who is the administrator of NCKLS?
98. What is the NCKLS 800 number?
99. What is the URL of NCKLS' Web site?
100. Who is the State Librarian of Kansas?
101. What is the 800 number of the State Library?
102. What is the URL of the State Library of Kansas Web site?
103. What is the URL of the Kansas Library Catalog (KLC)?
104. What is KICNET?
105. What is the Kansas Library Card?
106. What is the URL of the Kansas Library Association (KLA)?
107. What is the URL of the Kansas Library Trustees Association (KLTA)?