

2025 | Public Services Manager Team



Manager Guidebook

Running JDL Branches Effectively

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Part 1: Your Role as a Leader

Congratulations! You're now part of the districtwide team of leaders at Jackson District Library. We are so glad to have you here. The impact you'll have on our communities is tremendous and with your help, barriers will be overcome and the chances our residents have for success will be improved.

Managers at Jackson District Library (JDL) are passionate about their work and, as leaders, are expected to make decisions through the lens of JDL's values. These values guide all employees and should be a regular part of team discussions, initial training, and the annual evaluation process.

Priorities

JDL managers are committed to modeling these values for staff and making decisions based on the following priorities:

1. Service to the Community

JDL exists to serve the residents of Jackson County. Your top priority is ensuring that you and your team provide exceptional customer service in every interaction.

2. Service to the Organization

JDL has the power to positively impact the community through education, literacy, and access to information. As a manager, your role is to steward community resources wisely and contribute to the organization's overall success by effectively managing your branch(es) or department.

3. Service to Our Staff

A supportive and inclusive workplace enhances the service staff provide to both the community and the organization. It is your responsibility to:

- Ensure staff feel valued, impactful, and appreciated
- Provide proper training and clear expectations
- Offer generous, conscientious, and equitable treatment in the workplace

Conduct

As a JDL manager, **your conduct sets the tone** for your branch and your team. You are expected to lead with professionalism, open-mindedness, and respect in all workplace interactions.

Approach each situation with **a positive outlook and a willingness to embrace new ideas**. Whether working with staff, peers, or patrons, assume good intent and recognize that everyone is doing the best they can in the moment.

Leadership & Accountability

Your primary responsibility is to ensure that your branch or department delivers **exceptional library service**. Delegate tasks thoughtfully but remember: **the overall success of your team remains your responsibility**. You should make yourself available to coach, clarify expectations, and offer guidance as needed.

Communication & Conflict Resolution Manager Roles

- Communicate **clearly and directly** with staff and colleagues
- Address concerns or conflict **first with the individual involved**
- Involve the **Assistant Director or HR** only if the situation continues or escalates, after sincere efforts to resolve the issue directly

Meeting Participation & District Engagement

- Come to meetings **prepared to participate and contribute**
- Track your **progress toward annual goals**
- Use **one-on-one meetings** to share updates, request help, or seek clarification
- Contribute to **district-wide workgroups** and stay informed about trends in the library profession

JDL Presents a Unified Voice to Patrons and the Public

If you or your team have concerns about policies, procedures, or decisions, raise them internally—**through meetings or appropriate channels**. Be thoughtful and constructive when sharing your perspective. Once a decision is made, managers are expected to **support and uphold it publicly**, even if it differs from their personal preference.

Communication

Clear and professional communication is essential to JDL's success. As a manager, you set the tone for how communication flows within your branch, department, and the organization as a whole. This section outlines expectations for different types of communication.

Communicating with your Manager

- The preferred method of communication with the Assistant Director is text message or Teams message.
- If you need to call in sick or take a personal day, send a personal text as early as possible, noting if branch coverage is needed.
- For urgent matters, call the Assistant Director's cell phone (available 24/7 as needed)
- If an email requires immediate attention, mark it High Importance (!) or include "TIMELY" in the subject line.

Emergency and Incident Communication

- In a health or safety emergency, call 911 immediately (please empower your teams to be able to call 911 as well).
- For other urgent issues:
 - Contact the Assistant Director for non-facilities related matters
 - Contact the Facilities Manager for facilities emergencies. If unavailable, contact the Assistant Director. If neither is available, contact the Director.
 - Incident Reports: If an issue requires documentation (e.g., security concerns, injuries, disruptive patrons), complete an Incident Report and notify administration as soon as possible.

Facilities and IT Requests

Routine facilities and IT issues should be submitted as a ticket via the intranet. Emails and Teams messages won't ensure that your needs will be addressed immediately. Include clear, objective details and attach photos if applicable.

Response Expectations

- Respond to texts and phone calls from JDL staff and administration the same day whenever possible.
- Respond to emails and patron communication within two business days.

Internal Communication Best Practices

SETTING THE TONE

As a manager, your communication style influences team morale and workplace culture. This means you strive to:

- Communicate clearly and professionally, using a respectful and positive tone.
- Provide constructive feedback rather than criticism.
- Avoid passive-aggressive language or sending emotionally charged messages.
- Assume good intent in interactions and ask clarifying questions when needed.
- Ensure that your staff feel valued, impactful and appreciated.



Resource Recommendation:

Harvard Business Review's [Guide to Difficult Workplace Conversations](#)

HANDLING CONFLICT AND DIFFICULT CONVERSATIONS

- Address issues in person or via phone/Teams rather than email when possible.
- Focus on solutions, not just the problem.

- Use "I" statements (e.g., "I noticed this concern" vs. "You never do this").
- When emotions are high, pause before responding and revisit the conversation when everyone is calm.

 **Resource Recommendation:** [Managing Conflict for Supervisor Success](#)

Team Communication Guidelines

REGULAR CHECK-INS AND STAFF ENGAGEMENT

- Hold monthly team meetings to ensure everyone is informed and engaged in their roles.
- Conduct monthly one-on-one meetings to provide feedback, support growth, and discuss challenges.
- Encourage staff to ask questions and raise concerns without fear of judgment.

 **Resource Recommendations:**

[13 Ways to Get the Most Out of One-on-One Meetings](#)

[3 Keys to Starting to do 1 on 1s with Your Team](#)

[101 Questions to Ask in One on Ones](#)

ENCOURAGING TRANSPARENCY AND RESPECTFUL COMMUNICATION

- Promote an environment where staff feel comfortable voicing ideas and concerns.
- Discourage gossip and negative talk about colleagues or patrons (if you hear it, ask them to talk to the person directly about the issue their issue).
- If a staff member brings a concern, listen fully before offering a response.

 **Resource Recommendation:**

[Introduction to Workplace Etiquette](#)

Patron Interactions and Public Communication

PROFESSIONALISM IN PATRON COMMUNICATION

- Always greet patrons warmly and use friendly, professional language.
- When addressing complaints, listen first, then respond calmly. If you don't know the answer, offer to find out and then contact them with the correct information. You can also direct appropriately.

Resource Recommendation:

[The Art of Giving Great Customer Service](#)

GUIDELINE FOR EMAIL AND WRITTEN CORRESPONDANCE WITH PATRONS

- Use clear, concise language and avoid jargon.
- Consider utilizing proofreading through an AI program like Copilot or ChatGPT.
- If responding to a complaint, acknowledge the concern and explain next steps.
- Do not share sensitive patron information via email.

Confidentiality and Information Sharing

WHAT CAN AND CANNOT BE SHARED?

Personnel matters should never be discussed openly or with staff that aren't directly involved.

Sensitive library policies and decisions should never be shared with patrons unless designated for public communication. In these instances, staff will be given talking points by a member of the Leadership Team.

Patron records are confidential- never share information about a patron's library use or borrowing history outside of staff that may have need of it for work or assistance purposes.

 Resource Recommendation:

[Library Privacy Guidelines | ALA](#)

ESCALATING SENSITIVE CONCERNS

If you have a concern with a staff member, address it directly with them first if appropriate. If the issue persists, escalate to the Human Resources Manager or Assistant Director.

Final Thoughts on Communication

Your role as a manager is to foster clear, professional, and constructive communication across all levels of JDL. By modeling transparency, active listening, and respectful engagement, you help create a positive workplace culture and ensure that staff and patrons receive the best possible experience.

Your Schedule

Calendaring & Time Off

JDL managers are responsible for managing their own schedules. Due to the public-facing nature of these roles, managers may need to adjust their schedules to meet branch needs. This could include covering for staff absences, supporting programs, or responding to unforeseen events.

Workweek Expectations

- Full-time managers should not exceed 40 hours per workweek without prior approval.

- Overtime requires director approval and is granted on a case-by-case basis, depending on staffing needs. Contact the Assistant Director if you feel your branch staffing needs require overtime, and they will seek further approval or help to find additional coverage.
- If fewer than 40 hours are worked in a week, paid time off (PTO) must be used to meet the 40-hour requirement.

Time Off Requests & Schedule Changes

- When submitting a time-off request, managers must ensure their branch(es) are adequately staffed before taking leave.
- Keep your Microsoft Outlook calendar updated with time off and work schedules.
- Communicate schedule changes to your staff to ensure clarity and continuity of operations.

Work From Home

As a benefit of their position, Branch Managers and Coordinators are permitted to work one day from home per week.

WORK FROM HOME GUIDELINES

- Managers should not work from home during the first 90 days in their role to allow for the complete onboarding experience.
- Work-from-home privileges may be suspended on an individual basis if they are not used appropriately.
- Work-from-home days must be documented as a note in manager timecards.
- On work-from-home days, managers should:
 - Remain available and responsive via Teams, email, and phone.
 - Set their Teams status to "Available" unless in a meeting.

- Communicate their availability to their staff at the beginning of the day.

Leading Your Team

Onboarding

At JDL, onboarding doesn't stop after a staff member's initial training. Managers should welcome new staff into their branch culture and into the district. **[NEED LINK TO FOLDER WITH BRANCH ONBOARDING DOCS]**

One-on-One and Team Meetings

📌 **Resource Recommendation:** [Expectations for One-on-One and Staff Meetings](#)

Performance Conversations

Managers should plan to have two performance conversations per year with each member of their staff. These conversations utilize values and strengths focuses that are important to JDL. Conversations should be had in February/March and September/October.

📌 **Resource Recommendation:** [Performance Review Templates](#)

Regular Meetings JDL Managers Attend

Workgroups

Managers are encouraged to engage with the broader organization by joining at least one district-wide workgroup after completing their first six months in the role. This timeline allows for sufficient onboarding while also providing opportunities to gain insight into JDL's district-wide operations. Talk to the Assistant Director about which workgroups have availability.

- **Workgroup Expectations**
 - Be prepared: Come to meetings ready to contribute, having reviewed any materials in advance.
 - Engage beyond meetings: Workgroups often require tasks to be completed individually or in subgroups between meetings. These commitments should be prioritized as part of your responsibilities.
 - Foster collaboration: Workgroups are a chance to connect with colleagues across the district, share expertise, and contribute to JDL's ongoing development.

Community Nonprofit Board Membership

Participation in an approved community board is an excellent opportunity to build relationships, advocate for the library, and strengthen community connections. Managers and staff who wish to represent JDL on a community board as part of their paid time must receive prior approval from the Director.

APPROVAL CRITERIA

Requests will be evaluated based on:

- Whether the organization has an existing district-wide partnership with JDL.
- Whether the mission of the board aligns with JDL's strategic goals.

Public Services Manager Meeting

This monthly, manager-led meeting focuses on discussions and topics identified as important by public service managers.

MEETING STRUCTURE AND ROLES

- This is not an update-driven meeting—routine updates should be posted in the locked Manager channel in Teams instead.

- Managers work in groups of three, rotating the roles of Facilitator, Notetaker, and Timekeeper every three months.
- The meeting rotates locations each month.
- Established meeting norms and a planning timeline guide each session.
- Those wishing to speak with public service managers as a group should schedule time immediately following the meeting in the same location.

Districtwide Leadership Team Meeting

Held every two months, this meeting brings together public service managers, coordinators, and administrative managers. The goal is to foster a professional learning community within JDL.

MEETING STRUCTURE AND ROLES

- Typically held in the Carnegie Auditorium
- Led by the Director, Assistant Director, Staff Development Coordinator, or other members of the Leadership Team
- A thriving professional learning community at JDL built on:
 - A compelling purpose, shared standards, and community focus
 - Collective responsibility for ongoing learning and improvement
 - Commitment to JDL's values and norms
 - Application of values-driven work districtwide
 - Relational trust among colleagues, patrons, and community partners
 - Continuous individual and group learning, supported by assessment and feedback

Manager Breakout Meeting

This optional monthly meeting provides an opportunity for public service managers to focus on leadership growth and peer connection.

MEETING FOCUS AND FORMAT

Initially topic-based, this meeting has evolved into a professional book study and an informal space for discussion and leadership growth.

- Meetings are typically held in the Spring Arbor community room.
- New managers are strongly encouraged to attend as part of their professional development.
- A Teams login option is available for those who cannot attend in person.

Part 2: Running Your Branch

Emergency Response

In any emergency, safety is the top priority—property and objects are secondary. Managers and staff should never put themselves in danger to carry out emergency procedures.

Branch-Specific Emergency Preparedness

- **Each branch must:**
 - Maintain up-to-date emergency procedures, including evacuation plans, shelter areas, and assembly locations.
 - Ensure all employees are trained on emergency procedures, with new staff completing training within their first month.
 - Regularly review emergency scenarios with staff, applying procedures to the branch's specific layout.

- **Chain of Command**

- The Person in Charge at the time of an emergency remains in charge until relieved by a higher authority or until local emergency responders take over.
- In the absence of the Director, authority follows the JDL Administration Policy (Volume III.1).

- **Managers must ensure that employees:**

- Never risk their safety to follow procedures.
- Know the location and proper use of fire alarms and extinguishers.
- Understand fire alarm protocols and evacuation routes.
- Know the designated assembly areas if the building is evacuated.
- Keep an updated list of staff members at the Supervisor's desk, along with a printed staff schedule for reference.
- Communicate any personal emergency assistance needs to their supervisor.
- Be aware of others who may need assistance, such as individuals with mobility impairments, hearing or vision impairments, or other accessibility needs.

By keeping these procedures clear, practiced, and accessible, managers help create a safe and prepared workplace for staff and patrons.

Scheduling Your Staff

Scheduling is one of the most important tools managers have to ensure great service, strong team morale, and efficient operations. A thoughtful, consistent approach to

scheduling supports staff work-life balance while meeting the needs of the community and the organization.

Scheduling Guidelines

- Branch managers are responsible for ensuring that their branch is scheduled to provide adequate public service coverage during all open hours. Managers should set start times and work schedules based on branch operations and community needs.
- A well-balanced schedule should include appropriate coverage at service desks, time for programming and outreach, and adequate off-desk time for staff to complete tasks, take breaks, and manage responsibilities.
- Monthly schedules must be posted by the 20th of each month for the month to come. The schedule should be posted in UKG for each team member's timesheet. The team schedule for the month should also be posted to the public services manager's channel in Teams.
 - Ex: September's schedule is due August 20th. By August 20th, generate a new schedule in UKG and post your branch's overall schedule (using Excel or Publisher) in Teams.
- Monitor staff workload and ensure equitable distribution of responsibilities and shifts, including weekends and evenings.

Attendance and Tardy Procedure

Punctuality and reliable attendance are essential to delivering consistent service and maintaining trust among your team and community. As a manager, it's your responsibility to model strong attendance habits, communicate expectations clearly, and address concerns promptly and respectfully. You can do this by having timely, supportive conversations with staff when concerns arise. Employees should understand where they stand in relation to these guidelines and what steps will come next if problems continue.

- **Resource Recommendation:**

[JDL Tardy Procedure](#)

[Tardy Example Scenarios](#)

[Tardy Administration Procedure](#)

Time Off Requests

Time off requests using vacation time must be submitted with two weeks' notice.

Managers should not approve these requests before finding adequate coverage for their branch at the minimum staffing level required to open (small and medium branches (2); large branches preferred (2-3); Carnegie (12)). This could be in the form of flexible staffing or coverage by another team member.

Managers should be transparent about times when time-off may be restricted (ex. Summer Discover, All Staff Meetings, or other large district initiatives) and should strive for fair and equitable approval across the team. Occasionally, tickets for vacations need to be purchased. If a request is submitted with 30 days' notice, that is sufficient time to find coverage for a vacation that needs to be planned. Time off will not be denied unreasonably.

Flexible Staffing

Our flexible staff are here to cover branches when there are shortages, calls in, or vacation time being used. Each Monday, an email is sent to flexible staff, branches, and other interested staff with coverage needs in the upcoming 30 days. The urgency of these shifts is communicated using a color code system.

- **GREEN** = Open Shifts that need coverage in more than a week's time. These should be posted to UKG to be self-scheduled by flexible staff.
- **YELLOW** = Open Shifts that need coverage within a week's time and could potentially impact a branch's ability to open. These should be posted to UKG to be self-scheduled by flexible staff and emailed to JDLOpenShifts@myjdl.com.

- **RED** = Open Shifts within the next 48 hours that will impact a branch's ability to open. These should be posted to UKG to be self-scheduled by flexible staff and emailed to JDLOpenShifts@myjdl.com. Outside of regular business hours, the issue should also be reported via text to the Branch Manager text group so that everyone can solve the staffing problem together. At times, managers will have enough coverage to allow their staff to be sent to a branch with a staffing shortage issue.

 Resource Recommendation:

[Flexible Staff Contact List](#)

[How to Post Open Shifts](#)

Branch Closures

If your branch must close unexpectedly (e.g., weather, facility issue), JDL leadership will determine whether staff need to be temporarily reassigned to another location.

- Reassignments are based on greatest system need and staff proximity.
- Staff may choose to use PTO instead of being reassigned.
- If staff are told not to report or are sent home, they will be paid for their scheduled shift.
 - If Jackson Public Schools close but JDL remains open, staff assigned to those school-based branches will report to the Community Engagement department for a temporary assignment.

 Resource Recommendation:

[JDL Policy VII.I: Emergency Closing of Facilities](#)

Training

New Staff

New staff are introduced to the Jackson District Library through their initial 3-week training.

THE FIRST DAY

- New staff meet with the HR department to complete new hire paperwork, review the highlights of our handbook and contracts, and familiarize themselves with our timekeeping system.
- They go to lunch with their manager. The manager can invite another team member to join them for lunch.
- They meet with the Staff Development Coordinator to discuss JDL culture & values. They also take a historical tour of the Carnegie Library.
 - The following 3 weeks, they train at least three of our branches to learn about the county-wide reach of JDL, meet many people, and better understand the diverse communities we serve. This time prepares them to understand circulation procedures and public service thoroughly.
 - They are scheduled to spend 2 hours at their branch during their first week. This time could be spent attending a staff meeting, taking a tour of the branch, meeting the team, shadowing staff at the desk, meeting with the branch manager, etc.
 - All Library Assistants should be able to participate in training new hires. Training new staff builds confidence and trust and is helpful for procedure review. Library assistants do these tasks daily and are the best staff to train new hires in them.

EXISTING STAFF

- Engaging in continuing education is integral to the JDL Value, "We are always learning". The Staff Development Coordinator shares training opportunities that you or your staff members can participate in throughout the year.

- The Staff Development Coordinator creates, curates, and updates tutorials for the JDL Staff Academy. These tutorials include topics such as JDL services & procedures, professional skills, digital skills, etc.
- When participating in not connected to the JDL Staff Academy, the employee should complete a training request form to document & request funding, if applicable. When submitting a training request, the staff member is expected to have prior approval from their direct supervisor and have no scheduling conflicts. A training evaluation form should be completed within one week of the training experience.
- The manager may also seek out and provide training opportunities for their team. They should contact the Staff Development Coordinator if they need assistance looking for a particular topic.

 Resource Recommendation:

[Staff Development - Home](#)

[New Hire Training Checklists](#)

[Training Request Form](#)

Engaging Your Community

 Resource Recommendation:

[Advanced Literacy Program Ideas](#)

[Mosaic Comparison Report.xlsx](#)

Friends of the Library

The Friends of the Jackson District Library play a valuable role in supporting library services, programs, and facilities across the county. To ensure funding requests are aligned with JDL's mission—"Inspiring our Community to Discover, Learn, and Succeed"—and the purpose outlined in the Friends' by-laws, JDL has established a clear process for managers to follow.

- **Funding Request Process**

- Develop and Submit Your Concept
 - Once you have a fully formed idea, complete and submit the [Request for Funding Form](#)
- Leadership Team Reviews and Approves (quarterly)
 - Only proposals that align with JDL's mission and strategic plan will be considered.
 - Submitters of unapproved requests will be invited to a debrief meeting to discuss feedback and next steps
- Branch Manager Presents Concept to the Friends
 - With the Director's signed approval, you'll attend the monthly Friends board meeting in person to present your request for funds.
 - If the request involves a contractor, JDL will select the contractor that best serves the library, staff, and patrons.
 - If the Friends approve funding, JDL will pay costs up front and invoice them for the agreed-upon amount

This process helps ensure transparency, consistency, and a shared commitment to impactful service. If you're unsure whether your idea qualifies, speak with your supervisor before submitting a request.

 Resource Recommendation:

[Request for Funding Form \(Friends\)](#)

[Documentation of Process for Requesting Use of Friends Funds](#)

Donations

Donations are an important way the community supports Jackson District Library's mission. Donations come in many forms—including money, physical items, and services—and all must be handled with care, gratitude, and proper documentation.

- **Monetary and In-Kind Donations**

- Donations may be general or designated for a specific branch, program, or purpose (e.g., in memory of a loved one)
- Donations can be accepted at any branch
- Staff must complete the [Monetary and In-Kind Donation Form](#)
- All monetary and in-kind donations are sent a thank-you letter from the Director
- If the donation is made in memory/honor of someone, a letter is sent to the family
- The Director determines how unrestricted donations are used, based on greatest need

- **Collection Donations**

- It is preferred that donors provide funds rather than physical materials, so Collection Services (CS) can assist with selection, apply library discounts, and ensure the materials meet JDL's collections policies
- The library does not accept secondhand items for addition to the collection—any donations of physical items (books, DVDs, etc.) must be brand new
- Local authors may donate copies of their published works
- Staff should complete the [Physical Collection Donation Form](#)

- **Historical Collection Donations**

- Donor should fill out the [Pre-Custodial Form](#)
- If approved by the Local History Librarian, a [Deed of Gift](#) form is completed by the Historical Archivist to give the library rights to use the item as it sees fit
- **Donating Time (Volunteering at the Library)**
 - Volunteer contributions are considered an important form of service donation
 - Volunteer coordination and recognition are coordinated through the HR office after an [application](#) is completed

 Resource Recommendation:

[Donate to the Jackson District Library](#)

[Monetary & In-Kind Donation Form](#)

[Collection Donation Form](#)

[Pre-Custodial Appraisal Form](#)

[Deed of Gift Form](#)

[Donations - Did You Know](#)

[Volunteer with the Jackson District Library](#)

Staff Cleaning and Monitoring Roles

Creating a welcoming and safe environment for patrons starts with keeping public spaces clean and presentable. While deep cleaning is handled by the Facilities team and custodial vendors, branch staff are responsible for light cleaning, monitoring, and maintaining public-facing areas throughout the day.

 Resource Recommendation: [Staff Roles for Cleaning](#)

Part 3: Due Dates, Reporting, and Processes

Timecards

JDL pays staff every other Friday. To ensure that all staff are paid on time, there are important deadlines for submitting, reviewing and approving timecards.

Submissions

- Timecards should be submitted by all staff by 9am on the Monday of payroll week. They should not be submitted until they are accurate.
- Managers should speak with staff that do not submit timecards by the time they are due for review and manage the process of getting it submitted so that it can be approved.
- Managers should communicate the importance of submitting timesheets accurately and on time to staff.

Approvals

- Approval of timecards by managers must be completed by 2pm on each Monday of payroll processing week. Both Finance and HR departments may contact managers if accurate approvals are not completed by 2pm.
- If a timesheet is not approved by the deadline, affected staff may not get paid until a later period.
- Managers should update tardy records as they approve timecards for each pay period (Mondays of pay week) using the tardy log spreadsheet located in HR documents on the intranet and placing in a note in UKG.
- Managers should contact each staff member that has accrued tardies via email to let them know how many they have.

Resource Recommendation:

[Tardy Procedure](#)

[Approving Timecards Procedure](#)

[Tardy Scenarios](#)

[Tardy Logs](#)

Marketing Information, Programs, Deadlines

Deadlines

Deadlines to submit program information using the LibCal Events Calendar and check requests to pay for programs are:

- **Winter:** December thru February programs are due October 31st
- **Spring:** March thru May programs are due January 31st
- **Summer:** June thru August programs are due April 30th
- **Fall:** September thru November programs are due July 31

Program Tiers

Tier 1: High-Priority Programs	Tier 2: Popular Programs	Tier 3: Niche Programs
Maximum marketing support & visibility. Examples include: • District Flagship Programs • Branch programs supporting advanced literacies • Programs supporting JDL strategic plan goals	Moderate marketing support based on audience reach and purpose: • Entertainment only • Specific audience focus • Less aligned with strategic goals but popularity expected	Minimal marketing support based on audience reach and purpose: • Entertainment only • Small audience focus • Not aligned with strategic goals or advanced literacies

Resource Recommendation:

[LibCal Events Calendar](#)

[Program Check Request](#)

[JDL ID Standards](#)

Budgeting

Effective budgeting supports intentional programming, community responsiveness, and strong communication between branches and administration. Each manager plays a key role in keeping their branch's budget accurate and aligned with JDL's mission. Managers are given budgets for programming, supplies, and office equipment to manage for their branches.

Your Role in Budgeting

- **Stay Community-Focused:** Your branch's budget should reflect the needs and priorities of your local community. Use demographic data and feedback from patrons and partners to guide programming and purchasing decisions.
- **Plan Proactively:** Budgeting is not a once-a-year task—it requires ongoing attention. Schedule regular time to review your spending and plan for upcoming needs.
- **Think Beyond the Building:** Outreach programming often serves community members who don't or can't visit the library. Don't forget to budget for programs that take place out in the community.

Best Practices

- **Track in Three Phases:**
 - Pre-Approval/Planning: Identify your program needs and submit supply requests in advance.
 - Ordering/Payment: Follow correct procedures to obtain supplies.

- Reconciliation/Reporting: Make sure your expenses are recorded and matched against your budget.

- **Why Expense Tracking Matters:**

- Keeps your branch budget on track
- Improves communication with the Finance department
- Supports better planning and more successful programs

Ordering Supplies

- **Know who approves what:**

- Program Supplies → Assistant Director (order mainly through Amazon; branch credit card supplied for other purchases)
- Branch/Office Supplies → Finance Manager (order mainly through Amazon)
- Janitorial Supplies → Facilities Manager (order through Friends Office Supply)

- **After ordering:**

- Log program expenses in your branch budget file. Your order will be approved after the tracked amount is verified.
- Reconcile expenses promptly each quarter when you receive the general ledger from Finance by comparing it to your Excel budget tracking spreadsheet
- Communicate regularly with Finance or Admin if something is unclear



Resource Recommendation:

[Supply Ordering Resources](#)

[FriendsOffice](#)

[Branch Budgets](#)



