



# Best Practices for Policy Development and Program Management

The creation of policies for a shared print program and management of the program is essential to ensuring the continued availability of the scholarly record through a sustainable program. Program management enables shared print programs to develop and plan for goals, while policies inform methods of taking action (i.e. procedures) on those goals. Both are needed to build sustainable and effective shared print programs.

This best practice pertains to considerations for both shared print programs and their member libraries concerning a variety of issues, including communication, outreach, value statements, equity and diversity, and goal setting. Many of these are based on existing current best practices, and when appropriate, link to those best practices. It is also important that programs regularly evaluate policies and program management to ensure member library engagement and commitment to the shared print program's goals. In order to ensure program sustainability, it is incumbent on the governance body of the shared print program to invest resources in policy and strategy development.

## Best Practice

*Each level presumes all checks of any/all preceding levels.*

### Shared Print Programs

#### Good

- Maintains awareness and understanding of the importance of diversity, equity, and inclusion work in shared print programs.
- Provides policies and procedures for member libraries to follow. These should include policies and procedures about things like resource sharing, retention renewals, withdrawals, etc.

#### Better

- Maintains a list of member library contacts for different programmatic areas, including primary contact, library dean/director, technical services contact, access and resource

sharing contact, and data resource manager in order to establish continued communication avenues for program policy changes.

- Provides a statement of value for program participation to be disseminated by member libraries.
- Conducts annual goal setting and makes goals publicly available.
- Annually reviews shared print policies with member libraries or working groups composed of representative constituents from member libraries to ensure they align with strategic goals of the program.
- Conducts program assessment (see [Best Practices in Shared Print Program Assessment](#)).
- Commits to diversity, equity, and inclusion work and projects in the shared print program.
- Provides and regularly updates shared [print education and awareness](#) materials for the program.
- Provides regular review of policies and procedures for member libraries to follow, and provides opportunities for members to learn more about them through webinars or other communication venues. These should include policies and procedures about things like resource sharing, retention renewals, withdrawals, etc.

## Best

- Maintains a current list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager and updates it annually through regular contact with member libraries in order to establish continued communication avenues for program policy changes.
- Provides a statement of value for program participation to be disseminated by member libraries and aligns it with values specific to different programmatic areas across member libraries.
- Participates in regular program assessment (see [Best Practices in Shared Print Program Assessment](#)).
- Conducts annual goal setting, multi-year strategic plans, and strategic goal setting. Makes goals publicly available and updates members regularly regarding them.
- Performs quarterly reviews of shared print policies to ensure they align with strategic goals of the program.
- Focuses on commitment to diversity, equity, and inclusion work and projects as a core component of shared print program.
- Provides and regularly updates shared [print education and awareness](#) materials for the program and has a committee devoted to maintaining and developing these materials for the program.
- Provides regular review of policies and procedures for member libraries to follow and opportunities for members to contribute to the development of new policies and procedures. Provides regular opportunities for members to learn more about the policies and procedures through webinars or other communication venues.

<b>Best Practices for Shared Print Programs</b>	<b>Good</b>	<b>Better</b>	<b>Best</b>
Maintains a list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager in order to establish continued communication avenues for program policy changes.		x	
Maintains a current list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager and updates it annually through regular contact with member libraries in order to establish continued communication avenues for program policy changes.			x
Provides a statement of value for program participation to be disseminated by member libraries.		x	
Provides statement of value for program participation to be disseminated by member libraries and aligns it with values specific to different programmatic areas across member libraries.			x
Conducts program assessment (see <a href="#">Best Practices in Shared Print Program Assessment</a> ).		x	
Participates in regular program assessment (see <a href="#">Best Practices in Shared Print Program Assessment</a> ).			x
Conducts annual goal setting and makes goals publicly available.		x	
Conducts annual goal setting, multi-year strategic plans, and strategic goal setting. Makes goals publicly available and updates members regularly regarding them.			x
Annually reviews shared print policies with member libraries or working groups composed of representative constituents from member libraries to ensure they align with strategic goals of the program.		x	
Performs quarterly review of shared print policies to ensure they align with strategic goals of the program.			x

Maintains awareness and understanding of the importance of diversity, equity, and inclusion work in shared print programs.	x		
Commits to diversity, equity, and inclusion work and projects in the shared print program.		x	
Focuses on commitment to diversity, equity, and inclusion work and projects as a core component of shared print program.			x
Provides and regularly updates shared <a href="#">print education and awareness</a> materials for program		x	
Provides and regularly updates shared <a href="#">print education and awareness</a> materials for the program and has a committee devoted to maintaining and developing these materials for the program.			x
Provides policies and procedures for member libraries to follow. These should include policies and procedures about things like resource sharing, retention renewals, withdrawals, etc.	x		
Provides regular review of policies and procedures for member libraries to follow, and provides opportunities for members to learn more about them through webinars or other communication venues. These should include policies and procedures about things like resource sharing, retention renewals, withdrawals, etc.		x	
Provides regular review of policies and procedures for member libraries to follow and opportunities for members to contribute to the development of new policies and procedures. Provides regular opportunities for members to learn more about the policies and procedures through webinars or other communication venues.			x

## Member Libraries

### Good

- Provides the shared print program with a list of member library primary contacts.
- Shares, at the time of hire, the shared print program's statement of value with new employees when appropriate.
- Maintains familiarity with the shared print program's goals.
- Maintains familiarity with the shared print program's policies and procedures.

### Better

- Provides the shared print program with a current list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager.
- Shares and posts the statement of value for the shared print program with staff regularly.
- Provides new staff resources from the shared print program that include information regarding FAQs, policies and procedures, software and hardware requirements and uses, general instructions for member libraries, and other things new staff need to know about the program from the program's perspective. Schedules introductory meetings with the shared print program coordinator.
- Maintains familiarity with the shared print program's annual goals and communicates those with relevant staff and stakeholders like deans, faculty, staff, patrons, etc.
- Ensures adherence to shared print program policies and procedures through regular review and training.

### Best

- Provides the shared print program with a current list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager. Expresses a willingness to provide staff as experts who can act as consultants for the program if needed, and communicates any changes to contacts immediately to the program.
- Shares and posts the statement of value for shared print programs for staff regularly and for continued availability and develops detailed internal documents related to value to highlight importance of participation for different areas of the library.
- Provides new staff resources from the shared print program that include information regarding FAQs, policies and procedures, software and hardware requirements and uses, general instructions for member libraries, and other information new staff need to know about the program from the program's perspective. Schedules introductory meetings with the shared print program coordinator. Develops internal library specific documents to augment materials provided from the shared print program for new staff.

- Maintains familiarity with the shared print program's annual goals and communicates those with relevant staff and stakeholders. Incorporates the shared print program's goals into the library's and/or unit's annual goals.
- Ensures adherence to the shared print program's policies and procedures through regular review and training. Participates in governance of the program to ensure creation and alignment of policies and procedures.

<b>Best Practices for Member Libraries</b>	<b>Good</b>	<b>Better</b>	<b>Best</b>
Provides the shared print program with a list of member library primary contacts.	x		
Provides the shared print program with a current list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager.		x	
Provides the shared print program with a current list of member library contacts for different programmatic areas including primary contact, library dean/director, technical services contact, and data resource manager. Expresses a willingness to provide staff as experts who can act as consultants for the program if needed, and communicates any changes to contacts immediately to the program.			x
Shares, at the time of hire, the shared print program's statement of value with new employees when appropriate.	x		
Shares and posts the statement of value for the shared print program for staff regularly.		x	
Shares and posts the statement of value for shared print programs for staff regularly and for continued availability and develops detailed internal documents related to value to highlight importance of participation for different areas of the library.			x
Provides new staff resources from the shared print program that include information regarding FAQs, policies and procedures, software and hardware requirements and uses, general instructions for member libraries, and other information new staff need to know about the program from		x	

the program's perspective. Schedules introductory meetings with the shared print program coordinator.			
Provides new staff resources from the shared print program that include information regarding FAQs, policies and procedures, software and hardware requirements and uses, general instructions for member libraries, and other information new staff need to know about the program from the program's perspective. Schedules introductory meetings with the shared print program coordinator. Develops internal library specific documents to augment materials provided from the shared print program for new staff.			x
Maintains familiarity with the shared print program's goals.	x		
Maintains familiarity with the shared print program's annual goals and communicates those with relevant staff and stakeholders.		x	
Maintains familiarity with the shared print program's annual goals and communicates those with relevant staff and stakeholders. Incorporates the shared print program's goals into the library's and/or unit's annual goals.			x
Maintains familiarity with the shared print program's policies and procedures through regular review and training.	x		
Ensures adherence to the shared print program policies and procedures through regular review and training.		x	
Ensures adherence to the shared print program policies and procedures through regular review and training. Participates in governance of the program to ensure creation and alignment of policies and procedures.			x

## Examples Documents

### Onboarding documents

- EAST's onboarding documents
  - for [Administrators](#)
  - for [Collection Managers](#)
  - for [ILL Librarians](#)

- for [Tech Services Librarians](#)
- HathiTrust's [Orientation and Informational Documents for Library Staff](#)
- WEST's onboarding documents
  - [WEST info brief for library leaders](#)
  - [WEST info brief for collection managers](#)
  - [WEST info brief for technical services](#)
  - [WEST info brief for resource sharing](#)

#### Policies and procedures

- EAST's [Policies and Documentation](#)
- HathiTrust's [Operating Policies and Guidelines](#)
- SCLL's [Policies & Guidelines](#)
- WEST'S [Operational documents](#)

#### Statement of Value

- HathiTrust is currently developing "The Value of HathiTrust's Shared Print Program" and will link here once posted
- WEST's "[The Value of Membership in the Western Regional Storage Trust](#)"

#### Shared Print FAQ's

- COPUL's Shared Print Archive Network's [Frequently Asked Questions](#)
- HathiTrust's [Shared Print Program FAQ](#)
- SCLC's [FAQ](#)
- WEST's [Frequently Asked Questions](#)

Last Updated: December 2021