

Do's and Don'ts of Documentation

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Abstract

Whether through grant funding or taxpayers' dollars, public libraries are entrusted with money to spend on programs and services. Funders, as well as other stakeholders, will be interested in accountability, wanting to know what the library has been doing with these funds and what the stakeholders got for their money. The author argues that fully documenting programs and services – which many libraries fail to do – provides a tangible answer to these questions, as well as a record that can be used to expand or replicate successful initiatives. A series of best practices for documentation are proposed, which include the need for planning, marketing, and assessment information, as well as the collection and distribution of visual and textual material. Different levels of documentation are discussed, and the differences between what is merely acceptable and what is good, or even excellent are identified. A list of the various audience members with whom documentation might be shared is included. The author concludes that when a library needs to make a case for funding or government support, documenting a library's successful programs is a good professional and political move.¹

Why Document?

Whether through grant funding or taxpayers' dollars, the public library has been entrusted with money to spend on programs and services. Your funders, as well as other stakeholders, will want to know, "What has the library been doing with these funds? What did we get for our money?" Documenting your programs and services provides a tangible answer to these questions, and acts as a permanent record of what happened when the program or service was offered.

Documentation helps to identify whether programs and services have been successful. When documentation is publicized, it also serves as evidence – to the community, the Board of Trustees, the Friends of the Library, potential donors, as well as members of local, regional, and perhaps even national government – that library is providing thoughtful stewardship of its resources and is accomplishing amazing things. Creating documentation makes good political sense, especially during times when public institutions are increasingly under scrutiny and questions are raised about their accountability and value.

Documentation also aids a library by allowing valuable programs and services to be repeated, either by the same library at a later date, in member libraries of the same system, or in libraries throughout the region. Without documentation, libraries may lose track of essential program details, and be unable to replicate or expand their offerings.

Do's and Don'ts

I recently searched for public library documentation of innovative library programs and services. Documentation could include, but was not limited to: grant applications, web pages, news articles, photos, marketing materials, assessment reports, and the like. I found that some libraries had quite a bit of good documentation and others... not so much. It got me thinking about some best practices, and some mistakes that librarians make when implementing library programs and services. What follows is a list of documentation do's and don'ts that I gleaned from my project.

- **Do Make a Plan** - Although some library programs can have success doing things on the fly, a program

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is much more likely to succeed over the long term when there is a formal plan in place. Applying for grants usually necessitates a well-organized planning document including a budget, timeline, and expected impacts of the program. These considerations – as well as a list of action items and staff responsibilities – are still important for library programs that are not externally funded.

- **Do Write It Down** - This one may seem obvious. Even when you have not sought external funding or are doing something on the fly, you still need to document. Nobody's memory is perfect, and you never know when another staff member may have to step in and take over the implementation of a program if the main contact person is not available. Writing down the details in advance makes it more likely that crucial elements will be remembered when needed, either by the original library, a different library that would like to offer a similar service, or an intrepid grad student doing research. (For a look at a great plan for a library program, check out the Redwood City Public Library's [Pitch-an-Idea Grant Application](#). This document could be used as a guideline in planning a non-grant-funded program or service. Not all project plans need to be this long.)

- **Do Justify It** - A library's programs and services should support the organization's mission statement. It's worth documenting this relationship in case the Board of Trustees or members of the community have questions about why a certain program or service has been implemented.

- **Do Market the Program or Service** - Yes, this is documentation. Word-of-mouth is a great way to promote library offerings, but it shouldn't be the only way. Think about the audience you're trying to reach and create materials (whether digital or physical) that will let them know you have what they're looking for. Be sure to save copies of these materials so they can be used again or modified if needed. (La Crosse Public Library uses many ways to get the word out about their popular Dark La Crosse stage show, including the [local news](#).)

- **Don't Limit Yourself to Words** - Although you'll

want written documentation of your program or service, don't forget the adage that a picture's worth a thousand words. Take photos or videos of your programs (with permission of the participants) and use them to spread the news about what your library is doing. Post them on social media or your website. Include them in your advocacy campaigns. Visual documentation can help tell your library's story just as much as facts and figures.

- **Don't Forget to Assess Results** - Assessment is a step that a surprising number of libraries fail to take. It's not enough to just jot down how many people attended a particular library event and include it in an annual report. Rather, libraries should document the ways in which program goals have or have not been met, and what short- and long-term impacts participants have experienced as a result. (For a look at a great program assessment, check out the Fraser Valley Public Library's [Library Live and on Tour Evaluation Report](#).)

- **Don't Hide It** - Make sure your documentation is somewhere easy to find if you need to refer to it or if someone asks about it. It doesn't need to be at your fingertips at all times, but should be in an organized physical or virtual location, preferably one that can be accessed by those most heavily involved in program or service delivery.

- **Don't Be Afraid to Share** - Whether on a web page, in a conference presentation, or just having the material ready if someone asks about it, librarians can help each other by being willing to make documentation available to their peers. An easy way to start sharing is by using Google Docs or Dropbox, where you can invite others to view (or comment on) what you've written. Of course, not every bit of documentation is for public consumption and that's okay. But allowing colleagues to access the details of what you've done helps them create their own successful programs and services, and that leads to even more communities being positively affected by their interactions with public libraries. Additionally, having documentation you can share with stakeholders like funders and politicians will put you

in a better place to advocate for library support.

Levels of Documentation

I mentioned earlier that some libraries had good documentation, but there are different levels of “good”. In reality there is:

- **Acceptable documentation:** a rudimentary plan and an attempt to record outputs (e.g., how many people attended a program or utilized a service).
- **Better documentation:** a well-organized, written plan, marketing materials, and an attempt to assess program outcomes in terms of what was achieved. In addition, you know where this information is kept.
- **Great documentation:** materials that show the scope of the program from start to finish, including planning, marketing and assessment. Great documentation allows another library staff member (or another library) to be able to replicate the program or service at a different time or in a different setting. Great documentation also includes rich assessment information, including both quantitative and qualitative elements, that describes the impact on the community being served. Plus, it’s in a format that is easily shared, which you are ready and willing to do.

Levels of documentation also pertain to the audience for whom the documentation is intended. The grant application you provide to a potential funder may contain more information than a community member is interested in. Documentation may need to be tailored depending on whom you’re sharing it with:

- **Your library staff** – Make sure at least one other person you work with has access to **all** the documentation you possess, in all forms. Make sure all library staff are familiar with the basic information of your program or service, who its target audience is, and how successful it has been.
- **Grant funders** – They will require a grant proposal and should also be informed in sufficient detail about the results of the program or service they supported.
- **Community members** – You should be willing to

provide them with any documentation that is appropriate for public consumption; most will not be interested in a long program plan or extensive assessment documents. Instead, give them a snapshot in the form of a brochure, a section of your newsletter, or a page on your website explaining what the program involves and what the outcomes have been so far. Include visual documentation to “show” as well as to “tell”.

- **Board of Trustees** – Depending on how involved they are, they may be happy with a brief report or may want more detailed information about proposals and comprehensive evaluation results.
- **Friends of the Library** – They are donors, so they’ll want to see evidence that the money they’ve raised and provided to the library has been well-spent. Like the Board of Trustees, they may be happy with a brief written report or more extensive information.
- **Members of government** – They have many demands on their time, so short and to the point documentation - with the salient points highlighted – will be best.
- **Colleagues at other libraries** – If they’re looking to replicate one of your programs at their workplace, they may want all the documentation you have... the more, the better.

Conclusion

Creating great documentation may not be the most glamorous thing that a librarian does. Yes, it can be time-consuming. No, it’s probably not the most fun you’ll ever have. However, the importance of documentation should not be dismissed out of hand. Documenting your library’s successful programs and services can be useful both professionally, when the opportunity comes to share with other libraries, and politically, when you need to make a case for funding or government support. Remember that program funders often require documentation not only before they award funds, but after a program has been completed.

Although it’s not always mandatory, creating

documentation is still a smart move because other library stakeholders will also be interested in what you planned and how it turned out. Taking the time to do it right may reap unexpected rewards. You never know when a bit of visual documentation on social media will go viral and attract new patrons and positive publicity for your library. Your assessment of a current project may influence the funders of a future project in your favor. Thoroughly documenting your library program or service is an important step towards improving your library's accountability and advocacy efforts.

About the Author

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