

Appendix A

Wisconsin Public Library System Service Standards

**Adopted by SRLAAW
August 2, 2013**

Library Advancement and Awareness Standards

The library system has a responsibility to provide its member libraries with services and training related to library advancement and awareness. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. The library system is encouraged to experiment with innovative methods for meeting these service standards.

Library Advancement

- The library system provides continuing education to member library staff and trustees in advancing the library's mission via workshops, newsletters, and webinars. The library system will offer a minimum of six (6) contact hours of such continuing education annually.
- The library system develops tools that can be tailored by local libraries and that make it easier for member libraries to create awareness of their accomplishments, needs, or concerns, e.g., press releases, sample letters to officials, etc.
- The library system works with member libraries to develop a database of area library supporters and a program for regularly informing them of local and area advancement needs.
- The library system informs member library staff, trustees, and supporters of pending legislation on the state and national levels that may affect libraries and explains how the proposed legislation might affect system and local library service.
- The library system facilitates participation of member library staff, trustees, and supporters in local, regional, and statewide library advancement events, e.g., candidate forums, WLA Library Legislative Day.
- The library system works with a variety of state, regional, and local government agencies on behalf of member libraries.
- The library system is readily available to assist member libraries in working for and securing local and county funding.
- The library system facilitates individual county library service planning processes when requested.
- The library system represents the interests of its member libraries to the Legislature and the Department of Public Instruction in the development of statewide library policy or services.
- The library system cooperates with other agencies or organizations for the benefit of member libraries and area residents.
- The library system has expertise to coordinate the collection, interpretation, and presentation of data at the systemwide level and local level.
- The library system works to establish library funding models that consider measures of library use in addition to circulation (e.g., digital checkouts, program attendance, etc.)

- The library system collects stories from member libraries that demonstrate successful collaborations with other libraries or organizations resulting in improved services, increased efficiencies, or cost savings.

Awareness

- The library system is responsible for the marketing and promotion of systemwide services.
- The library system coordinates systemwide efforts to promote member library services.
- The library system coordinates public relations activities within the library system and between member libraries and other agencies.
- The library system provides professional-level assistance in marketing and promoting local programs and services.
- The library system works with individual local libraries to develop customized professional-quality promotional pieces, including providing text editing, graphic layout, and reproduction services.
- The library system works with individual local libraries to develop customized professional-quality digital graphics for use with websites and social media tools.
- The library system works with individual local libraries to develop customized professional-quality websites, including providing design services and training in website maintenance.
- The library system has expertise in social media tools and the ability to provide training and assistance to member libraries in the effective use of these tools.

Collaborative Services Standards

The library system optimizes the services that it provides to its member libraries by collaborating with others. Collaborative services within, between, and/or among systems can result in more and better services at less financial cost and less duplication of effort. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- The library system actively pursues opportunities to collaborate within, between, and/or among systems in order to maximize efficiencies.
- The library system facilitates meetings within, between, and/or among like-minded staff from multiple systems in order to discuss and implement collaborative services.
- The library system facilitates group purchasing (e.g., library applications, supplies, equipment, downloadable e-resources) within, between, and/or among library systems.
- The library system plans for continuing education opportunities with other systems in the region or within the state.
- The library system encourages and promotes collaborative exchanges with other systems in the same region or within the state that use the same ILS vendor.
- The library system gives high priority to collaborative service developments on its state-required annual plan and report.

Continuing Education Standards

The library system has a responsibility to provide continuing education opportunities to its member libraries. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- The library system surveys member libraries on an annual basis to determine the continuing education areas that are of greatest interest to, or most needed by, member libraries.
- The library system plans all continuing education opportunities in accordance with the requirements set forth in the Certification Manual for Wisconsin Public Library Directors published by the Wisconsin Department of Public Instruction, Division for Libraries and Technology.
- The library system sponsors or co-sponsors a minimum of thirty-six (36) contact hours of continuing education opportunities annually for member library staff and trustees, as well as for library system staff and trustees.
- The library system ensures that at least twelve (12) of the thirty-six (36) annual contact hours of continuing education are provided in-person at a location within a reasonable driving distance.
- The library system, with input from member libraries, evaluates each CE opportunity and conducts an annual outcome-based evaluation of its continuing education program. Results from evaluations are shared with member libraries.
- The library system opens all continuing education opportunities to staff from all types of libraries in the system area.
- The library system director and appropriate staff meets with all new library directors to provide an orientation on system services and an overview of library services in Wisconsin.
- The appropriate library system staff meets with newly hired key library staff to provide an orientation on system services relating to their positions.
- The appropriate library system staff attends meetings with member library trustees and staff and provides consultation and/or continuing education related to local library issues, as requested.

Delivery Standards

Because the physical delivery of library materials is an essential element for effective resource sharing, the library system has a responsibility to provide a delivery service that connects libraries within the system and around the state. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. How delivery services are funded may differ from library system to library system. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- The library system makes local delivery service available to member libraries at least five days per week.
- The delivery service schedule, operational functions, and procedures will be based upon the needs of the member libraries; the cost-effectiveness for the library system; the proper handling and protection of materials being transported; and the safety of system, library and contracted staff handling delivery.
- The library system ensures that, within the system, material placed in delivery by a library shall be delivered to its destination library by the third business day, excluding weekends.
- The library system connects its local delivery service with the statewide library delivery network.
- The library system trains member library staff in effective and efficient methods for labeling and packing materials.
- The library system configures its Integrated Library System, whenever possible, to expedite delivery of materials requested by patrons.
- The library system encourages nonpublic libraries to participate in delivery networks offered through the system and the state.
- The library system will minimally perform two delivery volume studies per year. These studies will count either tote or item volume dropped off and picked up at each member library during the course of one full week.

Integrated Library System (ILS)

The library system has a responsibility to provide its member libraries with access to an affordable, shared integrated library system (ILS). Participation in a shared ILS is an essential element in each Wisconsin's public library's ability to provide modern and effective library service to its patrons, and the library system plays a key role in ensuring that its member libraries can participate in a shared ILS. The library system may provide an ILS and related services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. How a shared ILS is funded may differ from library system to library system. The library system is encouraged to experiment with innovative methods for meeting these service standards.

Administration and Funding

- The library system facilitates access to a shared integrated library system (ILS) that meets the needs of the member libraries and their patrons.
- The library system supports an online catalog for the public that allows for the discovery of library resources in all formats.
- The library system will dedicate staff and fiscal resources in support of and to maintain access to a shared ILS.
- The library system and its members create a plan and budget to upgrade and replace ILS equipment and software on a regular schedule.
- The library system prepares an annual program budget that accurately reflects the costs and needs for the ILS.
- Each ILS consortium utilizes a decision-making process that meets the needs of member libraries and the system.
- The library system, with input from the member libraries, develops a formula for cost-sharing among member libraries that is clear and equitable.
- The library system works with member libraries to produce and maintain standards for ILS use in a shared environment.
- The library system encourages the standardization of rules and procedures among ILS participants.
- With input from member libraries, the library system board and staff develop an ILS plan to ensure that the ILS continues to meet the needs of member libraries and their patrons.

Database Management

- The library system provides an effective and efficient way for member libraries' holdings to be added to the database.

- The library system works with member libraries to establish standards and procedures for entering bibliographic and item holding records in accordance with currently accepted library cataloging and classification practices.
- The library system ensures access to reports to assist member libraries in managing ILS data.
- The library system ensures that bibliographic records, item records, and item status for materials in its database are searchable through standard protocols.
- The library system ensures access to reports to assist member libraries in managing patron, bibliographic, and holdings data.

Training and Support

- The library system ensures that member library staff are properly oriented and trained on ILS procedures and protocols.
- The library system supports training of the public in the use of the online catalog.
- The library system provides statistical data as required for the DLT Public Library Annual Report, using the standard definitions supplied by the Division.
- The library system ensures access to statistical reports and provides assistance to member libraries in interpretation of data.
- The library system provides qualified, trained staff devoted to the management and support of the shared ILS.

Resource Sharing

- The library system encourages all member libraries to share individual library collections with as few restrictions as possible.
- The library system works with member libraries to provide a method for ensuring that lending between members is equitable.
- The library system works with member libraries to evaluate the shared library collection and develop methods to support consortium-wide collection development.

Interlibrary Loan Standards

Wisconsin's public library systems recognize that the sharing of material between libraries is an integral and vital element in the provision of library service and believe it to be in the public interest to encourage such exchanges. Interlibrary loan (ILL) is intended to complement local collections, and should not be used as a substitute for good library collections which meet the routine needs of users. **While ILL can be defined as any exchange of materials between libraries, this standard is intended to address only those exchanges that occur outside of a shared ILS.**

The effectiveness of the state's interlibrary loan system depends upon participation of public library systems, and libraries of all types and sizes, and rests on the belief that no library, no matter how large or well supported, is self-sufficient in today's world. While it is evident that some libraries are net borrowers (borrow more than they lend) and others are net lenders (lend more than they borrow), the system also rests on the belief that all libraries should be willing to lend if they are willing to borrow. *(Adapted from the Interlibrary Loan Code for the United States.)*

The library system has a responsibility to provide its member libraries with access to an effective ILL service that facilitates resource sharing with other libraries. The library system may provide ILL services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. The library system is encouraged to experiment with innovative methods for meeting these service standards.

Participation

- The library system encourages all member libraries to participate fully in interlibrary loan as lenders and borrowers.
- The library system encourages all participating ILL libraries to follow interlibrary loan procedures and protocols established by the system, RL&LL and/or OCLC.
- The library system ensures that patron-initiated interlibrary loan requests are mediated.
- The library system ensures and advocates for the confidentiality of the user.
- The library system supports efficient two-way communication/linking between and among local (system) consortia, state, and national ILL networks.

Training

- The library system provides training on creating and managing interlibrary loan requests.
- The library system provides an annual workshop on interlibrary library loan to clarify and review best/current practices, protocols, and procedures.

- The library system participates in/attends all DPI-sponsored meetings for systems and shares what is learned with area ILL colleagues.
- The library system promotes educational opportunities related to interlibrary loan and encourages participation.
- The library system promotes webinars which provide training on resources available through BadgerLink and encourages participation.

Communication

- The library system encourages all member libraries to subscribe to appropriate interlibrary loan communication channels.
- The library system ensures that area libraries receive promotional materials about resources/information available about interlibrary loan best practices, standards, etc.
- The library system ensures that participants have access to accurate ILL statistics.

Innovation / Future

- The library system explores nontraditional ILL practices, such as direct-to-user-delivery and purchase/print-on-demand options to ensure maximum and efficient accessibility and convenience.

Service Standards for Special Populations

The library system has a responsibility to assist its member libraries with the services they provide to special populations.* The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- The library system assists its member libraries in identifying special populations.
- The library system provides its member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating services for special populations.
- The library system facilitates its member libraries' use of the Department of Public Instruction's website, *Serving Special Populations* (http://pld.dpi.wi./pld_ssp), an online resource which follows up *Youth with Special Needs: A Resource and Planning Guide for Wisconsin's Public Libraries* (http://pld.dpi.wi.gov/pld_ysnpl) and *Adults with Special Needs: A Resource and Planning Guide for Wisconsin's Public Libraries* (http://pld.dpi.wi.gov/pld_specialasn) in the planning, development, and evaluation of services.
- The library system sponsors a minimum of six (6) contact hours annually of continuing education opportunities relating to, or showcasing, services to special populations.
- The library system collaborates with member libraries or other systems to obtain grants which provide funding to serve special populations.
- The library system assists member libraries in marketing services to special populations.
- The library system facilitates regional collaborations with member libraries, appropriate agencies, and other systems on services to special populations.

*Special populations, or non-traditional library users, refer to people of all ages who often face barriers to their use of public library services, or need specific resources or accommodations to make the most of their time at the library. This includes, but is not limited to:

- People living in alternative family and home situations (including foster care, nursing homes, detention facilities or other institutions, or who are displaced, living in poverty, and/or homeless)
- People with mobility and orthopedic disabilities, people with cognitive disabilities, autism, or traumatic brain injuries; people with emotional behavior disabilities; people with learning disabilities; people with hearing or vision disabilities; and people with varying speech and language abilities
- People in underserved areas and/or with diverse backgrounds
- People with limited literacy or information skills who do not use print, read well, or speak English; people whose native language is not English
- Specific age groups, such as aging populations

Technology Standards

The library system has a significant role in leadership and training in discovering and implementing new technology, in facilitating technology infrastructure, and in providing local technology support. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. How technology services are funded may differ from library system to library system. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- The library system provides its member libraries with access to technology expertise and technology consulting.
- The library system sponsors or co-sponsors a minimum of six (6) contact hours of technology-related continuing education per year.
- The library system provides a secure Wide Area Network (WAN), with adequate bandwidth, for data communication between member libraries, the system headquarters, and appropriate application servers. The library system will work with member libraries to determine the most appropriate method of data communication.
- The library system continually monitors bandwidth usage by member libraries.
- The library system assists member libraries in acquiring supplemental bandwidth when needed.
- The library system promotes effective cost-sharing by facilitating the hosting and licensing of shared applications and databases used by member libraries.
- The library system provides assistance with and support for essential member library technology services during all hours of library operation.
- The library system technology staff meets with member library technology staff at least once per year to consult and advise on the member libraries' technology infrastructure and technology-related workflow practices.
- The library system establishes competency guidelines for member library staff needed to use system-provided technology services. The library system develops and provides training based upon the assessment of library staff competency levels.
- The library system facilitates group purchases of computers, network devices, and other technology-related devices for member libraries in order to promote ownership of state of the art equipment and cost savings.

Youth and Young Adult Services Standards

The library system has a responsibility to assist its member libraries in meeting the literacy and learning needs of youth and young adults. Specifically, the library system provides education, information, and assistance to member libraries so they have the means to encourage youth, and their parents or caregivers, to use the library and increase their literacy skills. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- The library system sponsors a minimum of nine (9) contact hours annually of continuing education opportunities relating to youth and young adult services.
- The library system provides its member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating youth and young adult services.
- The library system assists member libraries in marketing youth and young adult activities.
- The library system assists member libraries in implementing best practices and meeting appropriate standards related to early literacy.
- The library system facilitates regional collaborations on youth and young adult services.

Appendix B

Wisconsin Public Library System Administrative Standards

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Governance

Public library system trustees are public officers and as such are legally responsible for the governance of the library system and the conducting of its operations in accordance with local, state, and federal laws. The library system has a responsibility to meet the following standards relating to governance.

- The library system is established and operates in accordance with Chapter 43 of the *Wisconsin Statutes*.
- The library system operates in compliance with other Wisconsin laws, such as laws relating to open meetings, ethics, and public records.
- The library system publically makes available all meeting announcements, agendas, and minutes to all member libraries.
- The library system operates in compliance with federal laws, such as the Americans with Disabilities Act and the Fair Labor Standards Act.
- The library system board has written bylaws that outline its purpose and its operational procedures and address conflict-of-interest issues. The bylaws are reviewed at least every three years.
- The library system board adopts written policies for operating the library system and reviews them on a regular cycle, ensuring that all policies are reviewed at least every three years.
- The library system board meets a minimum of six times per year at a time and in a physically accessible location convenient for the board and in accordance with the state law on open meetings and the Americans with Disabilities Act.

Management

The library system's administrators and staff use sound library management practices to apply the policies and statutory obligations of the governing board to the daily operations of the

library system. The library system has a responsibility to meet the following standards relating to management and administration.

- The library system director is responsible for developing operating procedures based on board policies and long range plan.
- The library system director monitors statutory changes and court decisions related to library and system operations and recommends policy changes needed to maintain legal library and/or system operations.
- The library system director keeps the library system board informed of all important issues facing the member libraries.
- The library system provides current financial and statistical reports for review at each library system board meeting.
- The library system director provides every new board member with a copy of the Trustee Essentials and participates in an orientation program with each new board member.

Planning and Evaluation

Library system trustees and staff have a continuing obligation to assess the changing service needs of member libraries. Conscientious planning will help the library system in its efforts to anticipate and respond to the member library's needs. The library system has a responsibility to meet the following standards relating to planning and evaluation.

- With input from member libraries, the library system board and staff create a long-range or strategic plan that meets the needs of member libraries.
- The library system's plan is reviewed and updated annually by the library system board.
- With input from member libraries, the library system board and staff evaluate the effectiveness of the long-range or strategic plan.

Finance

Library system trustees and staff have a continuing obligation to operate the library system in a fiscally sound, efficient, and prudent manner. The library system has a responsibility to meet the following standards relating to finance.

- The library system follows fiscal procedures consistent with state and federal requirements, system policy, and audit requirements in preparing, presenting, and administering its budget.
- The library system director prepares and the library system board reviews and adopts an annual budget proposal that accurately reflects the needs of the library system and the members it serves.

- The library system board reviews and approves bills at each library system board meeting, in accordance with applicable laws and policies.
- The library system director and staff maintain awareness of available grant and other outside funding sources.
- The library system staff applies for and implements grants from LSTA and other grant sources that benefit the system and its member libraries.

Personnel

Library system trustees and the library system director have a continuing obligation to ensure that the library system has the appropriate staff in place to provide the services needed by member libraries. The library system has a responsibility to meet the following standards relating to personnel.

- The library system board determines the system staff table of organization and sets compensation for system staff positions.
- The library system director is qualified for and maintains the appropriate level of certification under the provisions of the Wisconsin Administrative Code.
- The library system director is paid to perform system-board-designated duties for no fewer than 40 (37.5) hours per week.
- The library system board conducts an annual performance evaluation of the director.
- The library system director is responsible for personnel administration, including hiring, supervising, evaluating, and dismissing library system employees.
- The library system board adopts a set of personnel policies outlining the conditions and requirements for employment of system staff, and these policies are consistent with state and federal regulations and relevant court decisions. The board reviews personnel policies on a regular schedule, including after any significant change in employment law.