City of Appleton

225 N. Oneida Street
Appleton WI, 54911

Meeting Agenda - Final

Library Board

Wednesday, November 28, 2018 | **11:00 AM** | **225 N. Oneida Street**

Planning Committee

1. Call meeting to order

2. Roll call of membership

3. Information Items

18-1759 Public Library System Redesign Process Update

Attachments: PLSRVersion-6-Steering-Report-Draft-11-07-2018.pdf

18-1760 Inclusive Services Assessment and Guide for Wisconsin Public Libraries

Attachments: Inclusive Services Assessment - Board TS Summary.pdf
FULL_incl_servs_assessment_guide_public_libraries_beta.pdf

18-1761 Strategic Plan Review and Update

Attachments: Library Strategic Plan OnePage.pdf
Library Strategic Plan Full.pdf
2018 Appleton Public Library Objectives December 2017.pdf
City of Appleton Strategic Plan Current.pdf

18-1762 Trustee Retreat Planning

4. Adjournment

Reasonable Accommodations for Persons with Disabilities will be made upon Request and if Feasible.

PLSR Steering Committee Report Draft Version 6

Version of report draft upon adjournment of the in-person committee meeting on November 7, 2018

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Background

At their meeting in August 2012, System and Resource Library Administrators Association of Wisconsin (SRLAAW) conducted a summit and subsequent survey to examine how library systems could continue to most effectively deliver services to their member libraries. This action was largely in response to shrinking governmental budgets and consolidation of public library systems in other states throughout the nation. The subsequent report, *Creating Effective Systems*, recommended a need to conduct further studies on library system services, size, and strategies for implementing optimally configured systems and establishing service and administrative standards for public library systems.[1]

During the development of the 2014-2015 biennial budget, the Joint Finance Committee recommended the Department of Administration analyze library systems to "conduct a study to identify potential savings in public library systems through consolidation, technology, efficiencies, LEAN practices and service sharing" in consultation with the Department of Public Instruction (DPI). The Governor deemed this recommendation unnecessary and vetoed it and acknowledged DPI as the appropriate agency to conduct such a study without the need for legislative directive.[2]

In response, DPI's Division for Libraries and Technology initiated a Lean System Study Work Group to examine demand for services by member libraries and the resources and capacity of public library systems to provide these services. This work group identified areas of service provided by library systems that could be made more efficient. The major recommendation was that study continue and experts from each topical area be tapped to develop further recommendations and implementation strategies.[3]

While the Lean System Study Work Group finalized their report, the Council on Library and Network Development (COLAND) appointed a workgroup in July of 2014 to develop a strategic vision for library systems in the 21st century. This workgroup presented a series of recommendations to State Superintendent Tony Evers in January of 2015[4]:

- Library Consulting - Leverage distributed expertise to provide specialized consulting, verified by DPI;
- Provide and Support Technology Access through aggregation of software and services including shared platforms and expertise;
- One State, One Collection;
- Resource libraries must redefine their value proposition for the twenty- first century;
- Delivery Service - Transition to multi-hub delivery network;
- Coordinate Electronic Resources - Maximize purchasing power;
- Continuing Education - Maximize impact of continuing education funding
- Eliminate statutory language requiring Department of Public Instruction (DPI) to request 13% for library system aid.

COLAND included a road map and timeline with their recommendations to further study how public library systems could most efficiently and effectively deliver services in the topic areas identified by the Lean System Study Work group. The intent was to lead change at the local and regional level to maximize organizational resources and state funding in order to deliver the highest quality library services to Wisconsin residents for the tax dollars provided.[5]

Recommendation Development Process

In September 2015, the State Superintendent appointed an 11-member steering committee to oversee a multi-year project to re-envision how Wisconsin Public Library Systems serve Wisconsin's 381 public libraries. Membership was selected based upon library and system size as well as consideration for geographic distribution.

Members of the Steering Committee:

Name	Library	Type of Library	Role
Kent A. Barnard	Patterson Memorial Library, Wild Rose	Very Small Public	Member
Jon M. Bolthouse	Fond du Lac Public Library	Large Public, non-resource	Member
Beth A. Carpenter	Kimberly-Little Chute Public Library[1]	Mid-sized Public	Member
Bridget C. Christenson	Hatch Public Library, Mauston	Small Public	Member
John DeBacher	Department of Public Instruction	State Library Agency	DPI Liaison
Kristie L. Hauer	Shawano City-County Library	County Joint Public (& Rural)	Member
Paula Kiely	Milwaukee Public Library	Large Public & System Resource	Vice-Chair
Jessamyn C. Lee-Jones	Platteville Public Library	Small to Mid Public (Small Resource)	Member
Bryan J. McCormick	Hedberg Public Library,	Public (&	COLAND

[1] After appointment, Beth accepted a position with the Appleton Public Library.

	Janesville	Resource; & COLAND)	Representative
Stephen R. Ohs	Lakeshores Library System	Small System	Member
John T. Thompson	IFLS Library System	Large System; LEAN team	Chair

[Insert Map of Steering Committee distribution with library system boundaries]

The State Superintendent charged the Steering Committee with providing strategic vision, oversight, and general leadership in the development of recommendations to update and refine the roles and services of Public Library Systems and maximize public investment in library systems and public libraries.[6]

The Steering Committee, as well as all workgroup members, were made up of volunteers who had other full time jobs. Recognizing this, the Steering Committee issued a nationwide Request for Proposal for a project manager to plan, organize, and implement a process focused on eliciting recommendations from the library community. The project manager was also charged with facilitating meetings and structuring the idea generation of the workgroups. Two responses were received. The Steering Committee selected WiLS as the project manager during a meeting held in October during the 2015 Wisconsin Library Association's Annual Conference.[7] The following core principles were adopted by the Steering Committee in December 2015:

- Communication is critical for the success of the process;
- The process relies on openness and trust from all participants;
- Information and data should be the bedrock of the process;
- Outside expertise will add credibility and weight to the outcomes;
- The process will be used to grow skills needed to maintain flexible and community-driven service into the future.

The project manager led the Steering Committee through a process to form topical workgroups in March of 2016. Members of the workgroups were selected from a pool of voluntary applicants. These members were assigned to workgroups based on their subject matter expertise or their status as a user or customer of a service area. Each workgroup was meant to address statutory library system obligations as defined by statute. Ultimately, the following 7 workgroups were formed:

- Chapter 43
- Collections[2]

[2] Originally called XXXXX

- Continuing Education/Consulting[3]
- Delivery
- ILL/ILS/Discovery[4]
- Resource Libraries
- Technology

These workgroups were instructed to research their service area extensively and meet regularly to develop recommendations to the steering committee for inclusion in their final report. Workgroups were also instructed to identify, illustrate, and contextualize existing inequities in library service throughout the state and focus on maximizing equity of access for the citizens of Wisconsin, not the libraries or library systems.[8] As workgroups developed recommendations, feedback was solicited from the library community in a number of ways, including: an external group of participants tapped to review findings through surveys, presentations made at the 2016 and 2017 Wisconsin Library Association's annual conference, monthly calls scheduled with SRLAAW, and virtual question and answer periods open to the public.[9] The Steering Committee also identified communication liaisons in each system to help disseminate information to member libraries and library boards. Final reports from each workgroup were delivered to the Steering Committee on April 2, 2018.[10]

After the completion of the workgroup phase, WiLS transitioned from an active project manager role to a administrative and logistics coordinator role. The Steering Committee awarded a bid from Russell Consulting to perform the role of facilitating meetings and the decision making process.

The Steering Committee reviewed workgroup recommendations independently, as well as more formally at two in-person retreats in February and April of 2018. During these retreats, two groups of collaborators outside of the committee were identified to help craft a final report.

Ten library professionals were selected from a pool of applicants to be Core Recommendation Collaborators (CRC). The Steering Committee selected the members of the CRC based on geographic area and type of library to attempt to instill diverse thought into the process. The CRC worked with the Steering Committee on developing and testing overarching models of governance that could accommodate the workgroup report recommendations. This work was facilitated by Russell Consulting and took place during two all day meetings.

The findings of this work was shared with the library community and officially made available for public comment from June 11 to July 20. All public comments were compiled by WiLS and made available to Steering Committee and CRC members.

[3] Originally two workgroups, merged as overlap was identified.
[4] Originally two workgroups, merged as overlap was identified.

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A Model Recommendation Summit was held July 30-31 with XX participants joining the Steering Committee and CRC members to further test and discuss the model of governance. At the conclusion of the Summit, XX areas of consensus were identified.

The Steering Committee reconvened in person on August 16, to discuss the outcomes of the Summit and to begin to form concrete recommendations. Steering committee members were individually tasked with drafting concrete recommendations for review by the larger committee. A small writing subcommittee worked to refine the initial drafts and shared their progress with the Steering Committee

Directives Gleaned from the Library Community through the Recommendation Development Process

The process of developing the recommendations contained in this report was robust. A wide range of stakeholder groups were consulted for feedback. Library directors, library staff, system directors, system staff, library and system board trustees, county officials, as well as past and present DPI officials were all involved in the process. Large amounts of project documentation were made available to these stakeholder groups, and feedback was received from individuals and boards at the library, system and county levels. The Recommendation development process culminated in a summit-style meeting, followed by a final public comment period on the content derived from that summit. The amount of feedback received by the Steering Committee was both significant and prescriptive. An effort was therefore made to distill key directives expressed by the community at-large.

Service improvements must benefit library patrons.

Wisconsin public libraries and systems have a strong history of working together to provide excellent services. One of the Principles of the Process is to "ensure all Wisconsin public libraries have the capacity to provide equitable access to excellent library services regardless of the race, ethnicity, income, gender, or employment status of the people they serve, or their location within the state". Any service improvements moving forward must fulfill this principle and ultimately benefit the end-user, the library patron.

Workgroup reports should be used as frameworks for specific service improvements.

The Workgroups consisted of service experts from across the state. The studies they completed of current service areas were thoughtful and in-depth. Inequities were examined, which led to recommendations for improving service. Upon review by the library community, several Workgroup recommendations garnered early support for service improvements in specific areas: delivery, discovery layer, technology, and the creation of a CE portal. The Workgroup reports provide a solid foundation for moving forward in these areas.

Take action now on recommendations with robust support.

The specific areas mentioned above represent areas of greatest need for libraries; areas that would provide immediate, positive impact on service to Wisconsin residents. With the Workgroup reports serving as frameworks for improvements, action must be taken quickly and purposefully. Some of the Workgroup recommendations require more significant changes in order to affect service improvement. For example, state-scale implementation of a service such as technology would require changes to governance structures, funding, administration, and would require widespread support from the library community. It became clear throughout the

Recommendation Development Process that organic, non-mandated change should lead improvements forward.

Service improvements must be soundly-implemented.

Implementation of service improvements must be driven by effective research, planning, execution, and change-management. Implementation should also be supported by adequate resources. The library community expressed concerns about how administration, funding, and governance might change with proposed service improvements. Any service improvement moving forward must have a well-developed plan for how it will be managed, who will govern the service, how it will be implemented, how local relationships will be maintained or developed, as well as evidence of how efficiencies will be gained.

Potential Unintended Consequences Should Be Anticipated and Studied

Tweak and add content later.

Recommendation 1 - Develop System Standards, Best Practices, and Accountability

Recommendation

Establish mandatory system standards to ensure equitable delivery of services to member libraries in all parts of the state.

Create a formal mechanism for library systems to define best practices outside of system standards and make those best practices available to all library systems in the state.

Summary

Library systems are required to provide a full range of services per Wisconsin State Statute 43.24 to qualify and maintain its eligibility to receive state aid. The purpose of standards for Wisconsin public library systems and system staff is to encourage the further development of quality service by providing public library systems with a tool to identify strengths, recognize areas for improvement, and strengthen accountability to member libraries. It could be unlikely that all systems would meet these standards with current state funding. Instead, systems may collaborate and/or consolidate in order to provide the level of service the standards would represent.

Wisconsin State Statute 43.24(3) currently allows the Department to reduce aid to systems if they don't comply with existing standards. Reduction in aid could place additional complications on a system to meet the standards. It is recommended that any system unable to adhere to the standards should be required to develop a 12-month compliance plan approved by the Division to maintain current aid levels. The compliance plan should include resources needed, collaborative and/or consolidation opportunities and a stakeholders' communication plan. . .

It is recommended that the library system standards mirror the design of the public library standards for ease of use. The sections should include:

- Statutory Requirements (Chapter 43.15; 43.16; 43.17; 43.19; 43.24; 43.58)
    - Systems
    - Library Membership
- Tier One, a system must meet all of the Tier 1 standards (base funding?)
- Tier Two, all of Tier 1 and all but two of the Tier 2 standards (performance incentives)

It is also recognized that there are best practices in operating a library system that should not be necessarily addressed through formal standards but would be valuable in standardizing for further study and improvement of library systems in the future. For example:

- Accounting Standards

  The system business managers working with the the Public Library Data, Funding and Compliance Consultant build upon the work of the Funding Subcommittee to develop standardized revenue and expenditure accounts and terminology to provide consistent and uniform reporting of income and expenditures for the System Annual Reports and System Program Budgets and Plans.

- Consulting Services

  It is recommended that a team of system directors/consultants representing the 16 library systems along with Division representation develop a tracking system which uses the broad consulting areas identified in the PLSR Consulting Workgroup report as well as the type (email, phone, in-person, site) and number of interactions per year.

- Governance

  The level of individual board member awareness of library statutes and system operations can vary. A “Trustee Essentials” does not exist for system board members instead they rely on the more general version as their guide.

The creation of a formal mechanism to define best practices and standardization of data collection would better allow Wisconsin library systems to review the impact of the PLSR process on state residents as well as continue to improve system services into the future.

Value Proposition

Library services in the state are currently delivered to member libraries on an inequitable basis. Member libraries are often unaware of system standards and often systems use their best judgement in delivering services that may or may not be viewed as standard system services in other parts of the state. In 2013, SRLAAW created a set of voluntary standards to help with this, but service inequity continues. Creating mandatory standards would establish a baseline to ensure every library in the state has consistent expectations of service from their system. This will better enable local libraries to utilize local funding to augment system services in a way that best serves their community.

A substantial amount of time was spent during the PLSR process in gathering disparate data from systems to analyze system services and make recommendations for improvements. Sharing best practices and standard reporting practices between systems will better allow for

the measuring the success of PLSR recommendations as well as making further analysis and improvements possible. In addition, especially with financial data, standardization will reduce the time required for mandatory reporting for all systems. Libraries will also be able to compare system services easily, allowing libraries to easily identify and correct inequities of service delivery that may arise in the future.

Suggested Implementation Process

- DPI Establishes Library System Standards Task Force - *December 31, 2018*
    - Model the process and document after the one used for current edition of the public library standards https://dpi.wi.gov/sites/default/files/imce/pld/pdf/wisconsin_public_library_standards_6th_edition_2018_final.pdf
    - Composition 6-7 Members: System Directors; Public Library Directors or Library Staff representing Grade 1, Grade 2 and Grade 3 libraries
    - Task force members should represent a diversity of locations and sizes of systems as service providers and of libraries as service recipients whenever possible. Individuals with experience with different libraries and systems would be a desired characteristic.
    - Public Library Development Team to act as Task Force Resources and Project Lead
- Review current accountability measures, what's working, what isn't
    - Currently there are several measures of accountability for library systems--Governance; System Plan and Program Budget; System Annual Report; and System Plan and Program Budget.
- Release Draft for Comment - *April 1, 2019*
- Final Draft - *June 1, 2019*
    - Where should the final draft be submitted? Is this something that ultimately needs to go into statutes?
- Implementation - *July 1, 2019*
    - Sorting process: what could be done under ch 43, what are goals, administrative rules, best practices?
- Incorporate into System Planning Document - *August 1, 2019*
- Formalizing sharing of best practices
    - System Accounting Standardization
        - Convene Working Group of System Business Managers - *January 2018*
        - Release draft recommendations - *April 1, 2019*
        - Final Draft and Implementation - *June 1, 2019*
        - Incorporate into System Annual Report, Planning and Program Budget Documents - *July 1, 2019*
    - Consulting Services

        - Convene Working Group of Continuing Education Consultants - *January 2018*
        - Release draft recommendations for tracking - *March 1, 2019*
        - Incorporate any changes from library community - *May 1, 2019*
        - Begin tracking CE/Consulting hours - *July 1, 2019*
    - Trustee Essentials
        - DPI drafts Trustee essentials - *January, 2019*
        - Draft Trustee essentials is presented at WAPL 2019 and shared with the community
        - DPI incorporates suggestions received - *Summer 2019*
        - Trustee Essentials formally adopted and distributed - *Winter 2019*

Suggested Funding Source(s)

- LSTA - reimbursement to task force and working group members for meetings to discuss and establish standards
- WISE - any sort of interoperability to share best practices between software systems or reporting forms, talking about data standardization, creating a best practices repository

Measuring Success

- Standards are drafted and adopted by SRLAAW and COLAND
- Number of systems who are able to comply with tier 1 standards
- Number of systems who can comply with higher standards
- Repository for best practices is created
- Number of objects in best practices repository
- Number of uses of objects in best practices repository
- Measurable equity component

Recommendation 2 - Incentives for Change

Recommendation

The Steering Team recommends the Department of Public Instruction develop and support, with the assistance of an appointed committee, an incentive program that will encourage consolidations of Library System services to local libraries that would include voluntary mergers among the current 16 Wisconsin Public Library Systems and participation in regional or statewide services, for the purpose of reducing administrative costs in order to achieve equity in service delivery to Wisconsin public libraries and to improve and/or expand services to all Wisconsin residents.

Summary

This recommendation aligns with a series of studies documenting and analyzing the cost of providing services by regional library systems, which documented the duplication of services and administrative costs and suggested that opportunities to provide those same services at a reduced cost would lead to improved services throughout the State. Consolidation of services will lead to lower costs and increase equity of service delivery throughout the state. With statewide or regional services and fewer systems, cost savings could be used for to achieve equity or for expanding direct services to local libraries.

Following the PLSR process, consensus was built around these ideas. Consolidation of services and offering services on a regional, or in some cases, a statewide level and a reduction in the number of Systems would offer opportunities for reducing costs and improving services. Reductions in administrative costs would improve equity of service, increase efficiency of operations, and provide greater “protection” against financial downswings.

There is also a strong consensus that any mergers of Library Systems work best when voluntary and not mandated; further, it was agreed that incentives will help motivate systems to undertake the process. Attempts at merging systems or consolidating services can be challenging due to issues of local control, trust, and unclear processes and costs. There is no clearly articulated process, checklist, or step-by-step guide for implementing these types of changes. The DPI is well positioned to develop tools and to provide a level of support and consultation needed by library (and *library system*) administrators and boards.

The experience of individuals involved in both successful and unsuccessful mergers and consolidated services can provide valuable input in the development of these guides and should be asked to assist in their development and in identifying additional incentives, such as financial support for associated costs such as legal consultation and public relations.

Value Proposition

Providing services to local libraries through Wisconsin Public Library Systems is imperative for Wisconsin residents to have equitable access to quality services that meet their needs. The reduction of overhead and administrative costs associated with System operations through System mergers or service consolidation will benefit the equitable delivery of these services. While every merger or move to consolidate will be different, certain elements must be present to ensure success, including trust and commitment. The use of incentives can help fuel the

motivation needed to undertake the challenge of merging systems or moving to regional/statewide service delivery. Financial incentives and professional support provided through DPI will help with the direct costs as well as the personnel costs. A successful merger and/or regionalized service can be a catalyst for encouraging others to consider merging. Incentives to consider include funding for both future and the change process, such as project management, consulting, legal fees, planning, facilitation, legislative support, fiscal analysis, and other related expenses. an action plan that can be followed, authoritative support from DPI, funding for project leadership and support staff. These changes, when supported financially and through expert professional assistance, can be empowering to those directly involved, and inspiring to others.

Suggested implementation process

Upon the adoption of this recommendation, the Department of Public Instruction should support mergers and/or regionalization of services, by appointing a small team consisting of DPI staff and subject experts who have experience with merging or consolidating services, to develop a step-by-step guide to assist systems that wish to voluntarily undertake such changes. DPI will identify resources to fund incentive grants and develop a process and application for awarding grants, that will cover costs related to project management, consulting, legal fees, planning, facilitation, legislative support, fiscal analysis, and other related expenses. At such time that Systems declare their interest in merging, DPI will play a leadership role in advising and guiding the systems. They will develop standards and best practices regarding accounting and bookkeeping practices to smooth future consolidation of services and/or systems.

Measuring success

Measuring the success of this recommendation will be in documentation of several deliverables and in the action taken on the part of library systems to merge with others or to consolidate their services with another system. Deliverable include: 1) A step-by-step guide to System mergers; 2) an incentive package to aid in Systems in these processes; and 3) a grants process and application.

Success will also be measured by at least one successful merger and one successful regionalization of services. Quantitative and qualitative measures will be made using evaluation tools such process surveys, satisfaction surveys, data analytics, interviews, etc., with the results published in local and national publications and presented at relevant conferences.

Recommendation 3 - Reduce the Number of Systems

Recommendation

The PLSR Steering Committee recommends that the current number of regional public library systems be reduced.

Summary

Sixteen regional public library systems provide services to public libraries in Wisconsin. Many of these services -delivered at scale- are now relied-upon and save libraries hundreds of thousands of dollars on an annual basis. Since the passage of the legal framework allowing formation in 1971, systems have each evolved differently. Counties are the basic geographic building blocks for systems, thus systems range in size from ten counties, to single counties. Over a number of recent years, consensus has been growing among the library community that a strategic reduction in the number of regional systems (through consolidation) would help address service capacity issues. Adding to this consensus are a number of key reports by stakeholder groups, each insinuating potential service improvements resulting from a strategic reduction. These reports include:

- “Creating More Effective Public Library Systems” (2013/SRLAAW);
- “Lean System Study Work Group Recommendations” (2014/DPI)
- “Strategic Vision for Library Systems in the 21st Century” (2015/COLAND)

In addition to the above reports, the concept of a strategic reduction in the number of library systems was a key recommendation sent to the PLSR Steering Committee with a highly robust degree of support from the participants in the PLSR Model Development Summit.

Value Proposition

There are some areas of the state where there is great potential value to be gained from a reduction in the number of systems serving those areas. Achieved through consolidation, it is clearly possible that a smaller number of slightly larger multi-county federated library systems would be able to furnish member libraries (therefore also patrons) with a higher quality, more comprehensive set of services than most single-county library systems are able to provide.

In some regions of the state, strategic reductions in the numbers of systems will result in higher quality, more comprehensive set of services than most smaller library systems can provide.

Suggested Implementation Process

In order to achieve the underlying goals of this recommendation, the following process (or some version thereof) is advisable:

- DPI should provide adequate resources and full support for implementation of recommendation #7 “Using Incentives to Drive System Mergers”;
- Remove statutory barriers to library system mergers;
- Document and share best practices for library system mergers;
- Staffing changes, changes in leadership, etc. Consider consolidating through attrition;
- Engage DPI consulting when system director position is vacated to explore consolidation opportunities;
- Encourage Library Systems with 3 or fewer counties first;
- Support precursors to mergers, such as: Incentivize ILS mergers.

Measuring Success

- Fewer number of systems exist.
- A comparison of the list of services available to a member library of a single-county system pre-consolidation versus the list of services available to that same library after consolidation;
- A comparison of response times pre and post consolidation from the time a service is requested to the time the service is satisfactorily delivered (examples: resolution of IT help desk tickets, library consulting call-back times);
- A comparison of the net funding available via the system to member libraries pre and post consolidation.

Recommendation 4 - Evaluate Funding Distribution

Recommendation

The Steering Committee recommends the Department of Public Instruction appoint a study group tasked with conducting a thorough analysis of the current funding formula, including practices utilized to apportion state aids for regional library systems.[5] As a component of this investigation, the study group shall explore and propose alternative funding formulas, methods of apportionment, or other solutions with potential to improve equity of access to high-quality library services. The Steering Committee further recommends that any actual funding change be accompanied by an increase in state aid to library systems, in order to assure that no library patron experiences a decrease in service due to adverse impacts upon any library system.

Summary

Each biennium, the Wisconsin legislature approves an amount of state aid intended to fund the operation of regional library systems. This appropriation is further apportioned to the regional systems by the Department of Public Instruction. In general, this process is conducted according to a combination of statutory imperatives and administrative procedures. This formula -- as originally written -- combines aspects of population, geographic area, and municipal, and county expenditures to determine the amount each regional system receives on an annual basis. In the late nineties, legislative events occurred which in effect “froze” the data sets used to calculate funding levels of that time. Therefore, for at least twenty years, apportionment of state aid to library systems has not been based upon up-to-date population demographics or municipal expenditures. This is at odds with the intent of the original formula design as well as the 1999 attempt to replace local expenditures with shared revenue.

Throughout the PLSR process, discourse about the appropriateness (or fairness) of the funding mechanism for regional systems has persisted throughout the library community. At least one alternative funding formula has been proposed, as well as a number of discrete factors that should be explored (such as poverty, unemployment, and infant mortality rates). It is the belief of the Steering Committee that a sufficiently vigorous investigation of possible alternatives to current practice should occur. Such an investigation should culminate in meaningful changes that improve equity of access to high-quality library services across Wisconsin, while ensuring no system sees a decrease in base funding.

[5] The Department of Public Instruction provides a clear explanation of the formula and changes since it’s inception at https://wilibrariesforeveryone.blogspot.com/2015/05/calculating-state-aid-to-systems.htm)

Value Proposition

System funding has a direct impact on local libraries' ability to provide quality services to patrons. To ensure every Wisconsin resident benefits from library services, funding should adequately support the *system services* that libraries need. By conducting a thorough and objective analysis of the current State funding formula, alternative formula options, and any potentially unintended consequences, a solid foundation will be achieved for further decision-making and consensus building.

Suggested Implementation Process

- Appoint an implementation team.[6]
- Conduct an in-depth analysis of the current funding formula, practices utilized to apportion state aids for regional library systems as described in the recommendation.
- A budget should be established to support the work of the task force including, but not limited to project management, a third party consultant, travel, printing, and other miscellaneous costs.
- The task force should be in place no later than March 2019, with their report due no later than September 2019.

Measuring Success

Success will be measured by 1) the quality of the final recommendation and the rigor used in its development; 2) the ability of funding levels to ensure that each system meet new standards of service; and 3) the level to which equity is achieved while holding systems financially harmless.

[6] The Steering Committee recommends a small number (3-7) of topical experts. Makeup of the implementation team should minimize potential for conflicts of interest. https://www.google.com/url?q=http://knowledge.wharton.upenn.edu/article/is-your-team-too-big-too-small-whats-the-right-number-2/&sa=D&ust=1541014342685000&usg=AFQjCNEFA2abTUlOjDIMiMopoNQLiAlPSw

Recommendation 5 - Delivery Pilots

Recommendation

The PLSR Steering committee recommends that the Superintendent of the Department of Public Instruction initiate one or more pilot projects relating to library delivery services. Such pilot projects shall have the overarching goals of A) proving concepts relating to the PLSR Delivery Work Group Report, B) decreasing wait times for patrons, C) improving overall resilience of delivery services on a statewide basis, and D) reducing duplicated efforts.

Summary

Physical resource-sharing generates tremendous value for libraries and, therefore, citizens. Sixteen independent regional delivery networks currently provide physical delivery of library materials between Wisconsin libraries. These regional networks are each operated and administered by regional public library systems. Each regional network's hub is, in turn, linked to the delivery service of the South Central Library System (headquartered in the metropolitan area of Madison, WI). The end result is a resource-sharing architecture whereby a library patron in Superior can request a library item from a library branch in Kenosha, and receive it in a number of days.

In their report, the PLSR Delivery Work Group produced a number of recommendations geared toward providing more equitable delivery services to all areas of the State. The end-model originally described by the Work Group features eight larger delivery regions -each with a single "hub" location- that are interlinked. This delivery network was envisioned by the Work Group to be funded and coordinated as a single statewide delivery service. This would be an extremely significant shift in how delivery is provided in Wisconsin: a fact that was confirmed through robust feedback received from the library community throughout the PLSR project.

It is of unique importance to note the role of the South Central Library System in statewide resource sharing. Statewide delivery exists in Wisconsin due to the South Central Library System's work in the early 1990's to establish it. As the service took on a life of its own, it required that SCLS relocate to a larger facility, and develop internal management and logistics structures to support both the statewide service and SCLS's delivery service to its member libraries.

Value Proposition

- Through the pilot project approach, many of the concepts addressed in the Delivery Work Group report may be tested in a gradual fashion without putting the entire statewide infrastructure under stress.
- Equity of access to rapid, efficient delivery services will be increased in areas of the state under stress related to funding levels.
- Should the pilot project approach be successful, a blueprint will thus exist for further stages of transition.
- Should regional consolidations occur, efficiencies will be gained:
    - Transit times - resulting in patrons getting materials faster.
    - Miles travelled - resulting in fuel cost efficiencies.
    - Reduction of duplicated administrative overhead - resulting in economies of scale.
- Should regional consolidations of delivery occur -- either as part of a pilot project or in the latter stages of transition to the end-model proposed by the Work Group -- it is possible that existing regional library systems may see a reduction in delivery-related costs and a net increase in funding available for other services.

Suggested implementation process

One of the most common themes expressed by the library community through feedback during the PLSR process is that change should be rooted in sound empirical research, well-planned, incremental, and voluntary. The Steering Committee understands that, in order to satisfy these imperatives, reinvention of library delivery services may unfold in a manner that differs from the exact path laid out in the Delivery Work Group recommendations. However, for the purpose of laying the first cobblestones of a path toward achievement of the vision laid-out by the Work Group, the following process may be used:

- Hire a project manager and appoint a small task-force to oversee implementation of one or more pilot projects related to delivery service.
- Identify regions of the state where delivery-related pilot projects would create the necessary data to determine if more wide reaching changes to delivery are in the best interest of the state.
- Work with systems in identified regions to coordinate delivery and establish a single hub.
- Further work with systems in identified regions to create a link to South Central Library System, and/or other links to any future additional regional hubs as described in the delivery workgroup report.
- Utilize the Delivery Work Group recommendations to guide further development of regions to establish suggested initial core statewide hub connections between regions in the south and north of the new model:
    - Working with the current Indianhead and Wisconsin Valley library systems to establish a northern hub to provide connection with a southern hub for statewide delivery.
        - This pilot would include most or all of regions #2 and #3 in the map below. It would include nonpublic as well as public library delivery clients.
        - Both of these systems use the same contracted vendor, which should make the transition easier.
        - Northern Waters Library System (region #1 below) could be added later, if this proof of concept is successful.
        - Regions #4 could also be added later, completing the proposed delivery plan for the northern part of the state.
    - Working with the current Winding Rivers, Southwest, and South Central Library systems to improve delivery service in the southwest region while also establishing as southern hub to connect to the north (see above).
        - Delivery in proposed region #5 (see map) would be provided by Winding Rivers.
        - Delivery in proposed region #7 would be provided by South Central.
        - Delivery in Southwest would be increased to 4 or 5 days depending on availability of resources.

    - The advantages of these pilots are:
        - They demonstrate the feasibility of the new concept in both a vendor provided and library provided delivery environment.
        - By eliminating the current Western Route of the statewide delivery, those funds would be available for establishing a north/south hub connection. These hubs would replace the current route.
        - Nonpublic participants in the statewide network could be provided with increased frequency of delivery without increased cost.
        - The underserved libraries in the southwest could receive increased frequency of delivery without increased cost.
- Using an incremental implementation process, measure feasibility in an ongoing fashion through data gathering, cost analysis and evaluation of standards.
- A hybrid approach of contracted vendors and in-house delivery operations is needed for a stable delivery service.
- Any competitive bid processes will not make final decisions of service providers based on cost alone. The average per stop costs that currently exist in the state is essentially equal between the systems utilizing a contracted delivery service and those operating an in-house service. A balanced approach to maintain service stability can be done in a way that is also most cost effective.

The map on page XX shows the recommended eight regions model and possible hubs (starred on the map) in each region. While the delivery hubs will likely coincide with existing system or vendor locations in some regions during implementation, delivery hubs in this model are not fixed long-term as the potential for changing vendors through a competitive bid process may impact where a delivery hub is located.

Measuring Success

For the purposes of evaluation, a number of processes and data points could be gathered and analyzed at different times. To be sure, cost data (including “cost-per-stop”), transit metrics and patron wait-times should all be gathered at the beginning, during, and after “go live” of any delivery-related pilot projects and compared in an ongoing analysis. Doing this will ensure that success of the pilot(s) can be evaluated based on hard data. Service levels should also be evaluated throughout the process. For example, the number of delivery days per week should be analyzed across the state in order to demonstrate whether equity of access to high-quality service is increasing. In a more subjective -- yet important -- sense, satisfaction levels among libraries and patrons should also be gathered before, during, and after.

Recommendation 6 - Discovery Layer

Recommendation

The Department of Public Instruction will engage with topical experts, regional public library systems, and the library community at-large to create an effective, well-managed, state-scale library discovery layer.

Summary

A “discovery layer” refers to the visual interface used by library patrons to find, identify, select, and obtain the various types of resources offered by the 21st century public library. These resources include physical books and audiovisual materials, as well as an ever-broadening variety of downloadable and streamable digital resources such as audiobooks, feature films, news and/or scholarly articles, and other digital content.

The PLSR process has resulted in an unprecedented degree of understanding in regard to the commonalities and differences between library management software products. Likewise, it has also produced greater awareness of how library patrons seek resources, how discovery services are provided by the current regional library systems, and how those services are funded and managed.

Also throughout the PLSR process, the concept of a state-scale discovery layer option has maintained a robust degree of support from project participants, the library community, and other stakeholder groups.

Goals of the Recommendation

- Achieve interoperability between the various library management software platforms used in Wisconsin (COLAND Strategic Direction #2);
- Provide a best-in-class search interface option that allows patrons seamless access to library collections (both physical and digital) across the state regardless of where they live (COLAND Strategic Direction #3);
- Reduce procurement, budgeting, training and technical administration efforts that are duplicated by the current sixteen regional systems in maintaining fourteen discrete online discovery platforms, and;
- Embrace the critical need of libraries (and regional systems) to make decisions and tailor services in response to the needs of library patrons where they are.

- Add a bullet here pointing to possibility of opening up a new collaboration space in regard to making digital resources available - Badgerlink content, overdrive content, local collections or other content licensed locally or regionally.

Value Proposition

Wisconsin libraries already lead the nation in regard to sharing resources. However, the set of technologies relied upon to accomplish this are aging (for footnote: z39.50 originates in the 1970s). Successful creation of an effective, well-managed discovery layer at state-scale would improve services to patrons in the following ways:

- Library patrons would be able to search the collections of any public library in the state, obtaining rich, detailed and vibrant results that are optimized to achieve the shortest delivery time based on their geographic location;
- Library systems and/or individual libraries that do not have the resources to purchase or operate top-tier library management software would nonetheless benefit, dramatically increasing the baseline patron experience;
- Discovery-based interoperability between existing library management software would open up a significant new collaboration space - removing a barrier to new partnerships and allowing freer communication between libraries.

Suggested Implementation Process

- Hire or appoint a project manager and/or small task-force vested with the ability to drive the project;
- Conduct a general risk/benefit assessment in order to identify unanticipated consequences;
- Conduct a governance assessment in order to determine how decisions impacting the look, feel and function of the state-scale discovery layer will be made;
- Conduct a needs assessment to identify minimum technical requirements necessary to achieve interoperability between different library management software platforms;
- Identify a communication protocol that meets the above determined requirements for interoperability;
- Identify and use leverage to ensure that all major library software vendors doing business in Wisconsin support the chosen protocol or framework;
- Create, if necessary, an application capable of translating action messages between all major library management systems;

- Explore the current capabilities of library software vendor discovery products, including open-source platforms;
- Conduct a fiscal assessment to determine costs when scaled to the entire state;
- Organize a process to evaluate and select a product that will serve as the state-scale discovery layer;
- Create a structure for ongoing evaluation and improvement.

Measuring success

It is recommended that a statewide “importance/effectiveness” survey be developed, and deployed both before and after implementation. This survey should include an in-depth list of currently available and desired features of library discovery software. By deploying the survey before and after, comparisons may be made and conclusions drawn. For example: if - after implementation - a significantly greater number of libraries report a significantly greater degree of access to features they deem as important, the conclusion may be drawn that the project resulted in better service to more libraries.

Recommendation 7 – Learning Management System for Professional Development

Recommendation

Create and deploy a learning management system capable of A) housing and delivering content related to library professional development, B) managing a paperless system of certification and validation, and C) offering a statewide calendar of professional development opportunities for librarians and trustees.

Summary

Wisconsin is made stronger through a dedicated corps of library professionals. Like many other professions, ongoing professional development opportunities are needed to maintain a sharp edge. Wisconsin requires that library and regional system directors maintain certification through the Department of Public Instruction. This ensures that libraries are managed efficiently and effectively.

Historically, each regional library system has provided local professional development opportunities to its member libraries, and managed the process of certifying local staff. As the availability of new learning technologies has accelerated, many library systems have begun to collaborate, share content, and work together. This area is ripe for further positive change. However, the certification process is still entirely paper-based and requires many “touches” by local, regional, and state individuals.

The learning management system should meet, and exceed, the professional development needs of library professionals and library board trustees throughout Wisconsin. This system would serve as a repository of online professional development content (streaming courses, webinars, etc.) while also providing library staff and trustees with the ability to locate nearby in-person professional development activities through incorporation of an interactive event calendar. It is further envisioned that this portal will include the capability for library professionals to manage their own certification status online, while providing DPI the capability to exercise their statutory oversight obligation in a manner that is both efficient and effective.

Goals of the Recommendation

The goals of this recommendation are to:

- Furnish library professionals with a more effective means of discovering and obtaining content and instruction that is directly applicable to their professional development.

- Eliminate the currently paper-based process of certification, in favor of a user-friendly online system to streamline the process of applying for certification, submitting and tracking contact hours, validating contact hours, and granting of certification (or recertification) status.

- Foster collaboration between agencies that offer professional development opportunities through implementation of a curated calendar of events and opportunities across the entire state.

Value Proposition

Creation of a web-based CE Portal based upon modern technologies and best practices would have a number of positive impacts:

- Public librarian certification requirements in Wisconsin date back to as early as 1921. Modernizing this process would benefit our state by ensuring the presence of highly qualified leaders in the profession, while leveraging technology to reduce general administrative overhead (COLAND Strategic Direction #5).

- A well-curated learning management platform would significantly reduce the valuable time required to locate professional development opportunities. This, in turn, would result in more time spent providing direct service to the public (COLAND Strategic Direction #2).

- Current practice is for each regional library system to provide opportunities for professional development to member libraries. Therefore, quality and frequency vary greatly. Creation of a single online tool geared toward professional development for librarians and library trustees would reduce duplication of effort and spur collaboration while simultaneously improving equity of access to many high-quality professional development opportunities on a statewide basis (COLAND Strategic Direction #5).

Suggested Implementation process

- Appoint a small implementation team of well-qualified individuals.
- Consider hiring a project manager to drive the project, manage the implementation team, and serve as a bridge between stakeholder groups.
- Review any specifications for the platform that have been created to date, and create an authoritative list.
- Compare specifications with existing learning management system vendor capabilities.
- Explore potential cost, quality and feasibility of a tool developed “in house” by DPI or Department of Administration (DOA) personnel.
- Utilize platform specifications document to craft a Request for Pricing (RFP) or Request for Information (RFI). Distribute the request to qualified learning management system vendors and/or software development agencies.

- Create a process to evaluate software options, including:
    - Ability to meet content requirements and goals of this PLSR recommendation
    - User Experience
    - Administration requirements (back-end management)
    - Cost

Note: Any procurement process should emphasize results over cost. For example: selection of a platform simply because it complies with DPI procurement guidelines and is low-cost would not be appropriate and should be avoided through process design.

Measuring Success

- Workflow analysis of certification process
- A general survey should be completed to assess levels of satisfaction among library professionals with respect to access to (and quality of) professional development resources. This survey could also be done “before” and “after” for purposes of comparison.
- An analysis should be conducted by an external party to assess levels of collaboration between regional library systems.

Appendix A: Library Systems in Wisconsin: A Brief History

Wisconsin's library system law, providing funding for coordinated regional library services, officially went into effect in 1971 when Senate Bill 47 was signed into law. The creation of public library systems fostered the establishment of a strong network of resource sharing and mutually beneficial interdependence. The actual creation and development of public library systems in Wisconsin was a voluntary and gradual process. No county or public library is required to be a member of a library system; yet, as of this writing, all of Wisconsin's 72 counties and over 380 public libraries are library system members. Wisconsin's seventeen public library systems developed in distinct ways in response to the needs of their member libraries and area residents. The systems have continued to evolve as changes in society, resources, and technologies create new demands and opportunities.

The seeds for regional library services had been planted years earlier and several regional services had coordinated cooperative services. In 1956, the American Library Association published *Public Library Service: a Guide to Evaluation with Minimum Standards,* which introduced the library system concept. That same year the United States Congress enacted the Library Services Act (LSA) to provide federal funding for extending and improving public library service to rural communities. The Wisconsin Library Association and the Wisconsin Free Library Commission submitted a plan for LSA funding. Also in 1956, twenty-five public libraries joined together to form the Southwest Association of Public Libraries. In 1959 they obtained LSA funding to establish an ordering and processing center serving five counties, the predecessor to the Southwest Wisconsin Library System. Also that year, a regional library system was established in northwest Wisconsin serving five counties, the precursor of the Northern Waters Library Service.

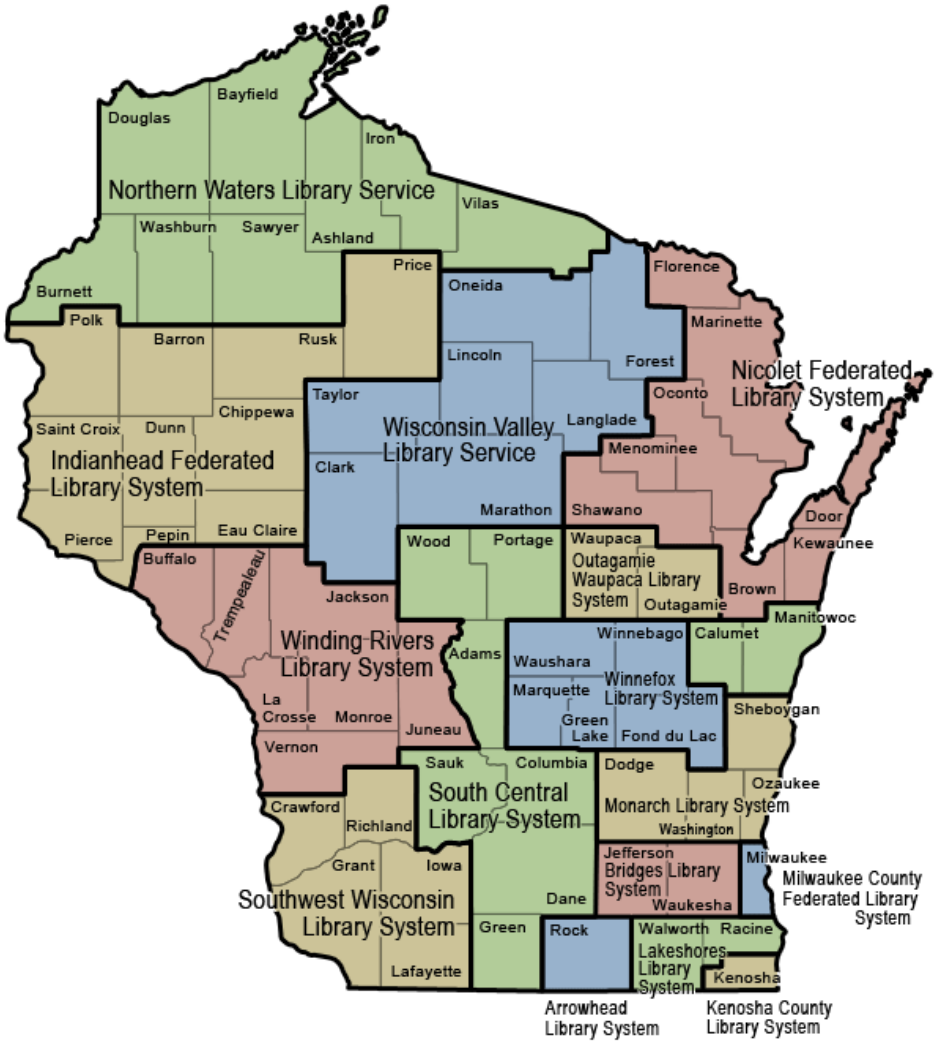
In 1963, the Free Library Commission, WLA and the Wisconsin Library Trustees Association adopted *A Design for Public Library Development in Wisconsin: Standards for Measuring Progress.* The following statement from that document helps to convey the vision
"Simply stated, the library system concept means that only by working together, sharing services and materials, can libraries meet the full needs of their users. Each public library, whatever its size, is an important link in a system of libraries joined together either formally or informally."
That document described a shared vision of public library systems that ultimately led to the development and adoption of 1971 Senate Bill 47 through a series of events:

- In 1965 the Wisconsin Library Commission was folded into DPI and became the Division for Library Services.
- In 1966 WLA approved a legislative study program calling for legislation to "implement the library system concept and interlibrary cooperation in Wisconsin.
- In 1968 the Library Development and Legislative Committee (LD&L) of WLA developed a report for the legislature.
- In 1969 that report was introduced as Senate Bill 363.

- The Senate Education Committee recommended the bill be revised, and
- In 1971 Senate Bill 47 was introduced and, after extensive legislative efforts by WLA, was passed by both houses. The bill included the following declaration:

> *"Recognizing the importance of making quality library resources and services readily available to all of the citizens of Wisconsin, the legislature, through this act, seeks to modernize library laws for public and school libraries, to promote development and improvement of public libraries through library systems and to provide maximum opportunities for cooperation among all types of libraries in order to encourage the most effective use of the library resources in this state."*

Since the passage of Senate Bill 47, a number of subsequent components of legislation have been passed to supplement and refine the guidelines and processes by which library systems operate. As of this writing, the following map represents the sixteen regional library systems in Wisconsin:



Appendix B: Funding Strategies and Sources

The PLSR project has not only produced the recommendations in this report, but a series of deep dives (in the form of work group reports) into each individual service provided regional library systems. Taken as a whole, it is abundantly clear there are a variety of opportunities to improve access to services, and to improve the effectiveness of the services themselves. In order to move forward without significant disruption to libraries and patrons, new service infrastructure must be put in place in parallel with the old. Realistically, this will require additional sources of funding beyond what is currently available in the form of state aid to regional systems.

Local library contributions - libraries paying into services

Through the process of recommendation development, a number of common themes have emerged in regard to potential sources of additional funding to support implementation:

- In-Kind resources contributed by state agencies. The Department of Public Instruction, Department of Administration and others have significant staff assets, though it is understood that resources are finite and priorities are many. These agencies could incorporate implementation of PLSR recommendations into their planning processes, so as to allow. Examples of in-kind resources might include:
    - User experience (UX) or design consulting expertise in regard to a library staff continuing education portal and validation tracker;
    - Direct development of software or web applications related to a library staff continuing education portal and validation tracker or ILS discovery layer;
    - Web hosting for a library staff continuing education portal and validation tracker;
    - Administrative coordination of ongoing initiatives related to moving the PLSR recommendations forward.

- Library Services and Technology Act funding derived from the “Grants to States” program. Through this program, Wisconsin is allocated roughly 2.8 million dollars. Expenditures of these dollars are prioritized by the Department of Public Instruction. Future planning by the division could incorporate funding to support implementation of PLSR recommendations. Specific examples may include:
    - A grant category to support a regional delivery pilot build-out;
    - A grant category to support development of a state-scale discovery layer;
    - A grant category to incentivize development and implementation of system best-practices.

- Library Services and Technology Act funding derived from other specific grant programs. A number of non-block grant programs exist, including the "Laura Bush 21st Century Librarian" and "National Leadership Grant for Libraries" programs. Other programs may be established in the future. These programs may provide an opportunity to acquire funding for components of the recommendations that require more in-depth work. Examples may include:
    - Grant applications designed to fund additional project management capacity.

- Funding related to the Wisconsin Information System for Education (WISE) program. The WISE program is focused on creating - and coordinating - the services and infrastructure required to improve how we use data to learn and educate. This program has recently been broadened to include libraries. It is possible that WISE-related funding (or other assets) may be allocated to implementing certain recommendations. Examples may include:
    - Funding the development of a uniform set of ILS communication messages;
    - Using the list of ILS communication messages to build a universal ILS communicator tool to aid regional delivery pilots;
    - Working with ILS vendors who do business in Wisconsin to ensure compliance with uniform communication specifications;
    - Funding and coordinating a process of product evaluation.

- Increase in state aids to the regional library systems. Annual state aid funding is allocated according to state statutes and the administrative code. However, the library community could establish future legislative priorities which include requesting a modest increase in state aid which the existing systems would use to collectively fund specific implementation components of PLSR recommendations. Examples may include:
    - Funding for the development of a universal ILS communicator tool to aid in regional delivery pilots;
    - Funding designed to ease transition to any changes to a modified funding allocation formula;
    - Any components of the recommendations or opportunities identified through the PLSR process with strong collaborative potential.

This document should be read as an initial consideration of potential funding sources. It is possible other sources may exist

Inclusive Services Assessment and Guide for Wisconsin Public Libraries

The Inclusive Services Statement

"Wisconsin public libraries are places where everyone should be safe, welcomed, and respected in experiences such as (but not limited to):

- Arrival at the building (transportation, physical accessibility, signage, hours of service, greetings by library staff)
- Intersections with library policies (getting a library card, using a computer, paying a fine)
- Perusal, use, and request of library materials (navigating the aisles, accessing Wi-Fi, individual privacy, diversity of collection)
- Participation in library-sponsored or library-located events (marketing of events, time and location, transportation, registration, room set-up, novice-friendly vs. designed for frequent users)
- Interactions with library staff (body language, tone, diversity of library staff, proactive/reactive engagement)
- Passive and virtual interactions through library signage, webpages, displays, and marketing (readability, tone, diversity, accommodations)."

"The practice of providing inclusive services requires continuous reflection and ongoing dialog with and between library administration, staff, and members of the community, with particular emphasis on including the voices of those who are underserved, underrepresented, and underrecognized within the community. Efforts should respond to the assets and needs of non-library users and users alike. Attention to actual, versus perceived, assets and needs is paramount; i.e., a barrier perceived by library staff may or may not be an actual barrier experienced by the user.

On a concrete level, inclusive services should be visibly incorporated into all library services. The concept that libraries are for everyone should be evident through every point of access or interaction with the library. A person's race, ethnicity, age, citizenship, literacy level, ability, family structure, income level, health status, gender identity, sexuality, style of dress, familiarity with public libraries - or any other dimension of identity - should neither negatively influence nor interfere with access to library services."

Assessment Opportunities for Trustees

- Library Board members reflect the demographics of the community
- Bylaws and policies available in the languages spoken in the community
- Community members who reflect the population demographics are involved in revising the Library Director's position description, which includes inclusive statements
- Regularly reviewing policies with attention toward whether they are creating unnecessary barriers
- Allocating funds for Board training on cultural competency and anti-bias

- Learn about the impact of fines on low-incomes families and patrons
- Creation of a written programming policy
- Understanding of the importance of devices that promote accessibility for technology in the library, including lending wifi units and computers and providing assistive technologies in the library
- Help in populating Advisory Boards that allow the library to better understand the needs and interests of various populations, such as seniors and underrepresented populations
- Approval of core values of creating an inclusive environment at the library

Staff and leadership also have opportunities in the assessment to grow and change, learning more about inclusivity and ensuring that our facility, programs and services meet the high standards we expect in this area.

11/12/2018 - Tasha Saecker

The Inclusive Services Assessment and Guide for Wisconsin Public Libraries

Produced by the Public Library Development Team

Participants in the inaugural 2018 Inclusive Services Institute developed this self-assessment tool and guide so that libraries are better able to evaluate the inclusivity of their spaces, programming, services, and administrative operations.

Wisconsin Department of Public Instruction
Tony Evers, PhD, State Superintendent
Madison, WI

DRAFT

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Inclusive Services in Wisconsin Public Libraries

The Inclusive Services Statement (link)

Wisconsin public libraries are places where everyone should be safe, welcomed, and respected in experiences such as (but not limited to):

- Arrival at the building (transportation, physical accessibility, signage, hours of service, greetings by library staff)
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- Perusal, use, and request of library materials (navigating the aisles, accessing Wi-Fi, individual privacy, diversity of collection)
- Participation in library-sponsored or library-located events (marketing of events, time and location, transportation, registration, room set-up, novice-friendly vs. designed for frequent users)
- Interactions with library staff (body language, tone, diversity of library staff, proactive/reactive engagement)
- Passive and virtual interactions through library signage, webpages, displays, and marketing (readability, tone, diversity, accommodations).

The Division of Libraries and Technology interprets Statute 43.24(2)(k) "Promotion and facilitation of library service to users with special needs" to encompass inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community. Diverse communities are strengthened by libraries that intentionally develop and deliver services to individuals or groups for whom accessing and using the library is difficult, limited, or minimized.

The library director and board of trustees should provide awareness and leadership concerning the concept and
implementation of inclusive services to library staff and stakeholders. Regional library systems should both support member libraries in matters of compliance, and communicate such efforts through annual system plans
and reports. The state library agency will provide consulting and collaborate with libraries and systems regarding
inclusive services. Wisconsin public libraries serve everyone, and it is the duty of everyone in the service of Wisconsin public libraries to foster inclusivity.

DRAFT

The practice of providing inclusive services requires continuous reflection and ongoing dialog with and between
library administration, staff, and members of the community, with particular emphasis on including the voices of
those who are underserved, underrepresented, and underrecognized within the community. Efforts should respond to the assets and needs of non-library users and users alike. Attention to actual, versus perceived, assets and needs is paramount; i.e., a barrier perceived by library staff may or may not be an actual barrier experienced by the user.

On a concrete level, inclusive services should be visibly incorporated into all library services. The concept that libraries are for everyone should be evident through every point of access or interaction with the library. A person's race, ethnicity, age, citizenship, literacy level, ability, family structure, income level, health status, gender identity, sexuality, style of dress, familiarity with public libraries - or any other dimension of identity - should neither negatively influence nor interfere with access to library services.

When libraries honor the full diversity of their communities, communities thrive. First and foremost, inclusive library services should be developed locally with and for all community members. Wisconsin public library systems and state library staff should facilitate coordinated regional and statewide inclusive services training and consulting. Our common goal is to improve life and learning opportunities for all Wisconsin residents.

The Inclusive Services Institute

The Inclusive Services Institute was a professional development and workgroup opportunity for Wisconsin public library and regional system staff committed to making Wisconsin libraries more inclusive to all community members and potential library users. The Institute offered reflective learning experiences on topics of equity and social justice. Participants worked on small teams to develop statewide resources. The Inclusive Services Statement from the Division of Libraries and Technology provides the foundation for the Institute content and workgroup efforts.

The Inclusive Services Institute is funded by a Library Services and Technology Act (LSTA) grant from the Institute for Museum and Library Services administered by the Public Library Development Team at the Wisconsin Department of Public Instruction.

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We thank the 2018 Inclusive Services Cohort for their time, talent, and commitment in developing the Inclusive Services Assessment and Guide.

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Introduction

The Inclusive Services Assessment and Guide was designed by Wisconsin public library and library system staff for Wisconsin public library directors, staff, and boards with the intent to foster inclusive library environments where everyone is safe, welcomed, and respected. This resource was developed to support libraries in implementing the Inclusive Services Statement. In addition, this resource intentionally complements the 2018 WI Public Library Standards.

How to Use the Inclusive Services Assessment and Guide

This resource was designed to be used by individuals and groups as an ongoing reflection tool. The checklist and supporting resources are meant to help libraries evaluate current services as well as plan for the future.

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. These responses are defined as follows:

- Yes - This response indicates that the library is currently executing the checklist statement
    - Example - "Yes; the library displays pictograms at the entrances of the restrooms"
- No - This response indicates that the library is NOT currently executing the checklist statement
    - Example - "No; the library does not display pictograms at the entrances of the restrooms"
- In Progress - This response indicates that the library is currently developing the checklist statement
    - Example - "In Progress; the library is in the process of installing pictograms at the entrances of the restrooms"
- Not Applicable - This response indicates that the checklist statement is factually irrelevant to the library
    - Example - "Not Applicable; The library does not have public restrooms because it is a bookmobile."

Scoreable responses to each checklist will provide a snapshot of current levels of inclusion. Supporting materials, such as the reflection worksheet (available now) and next-step suggestions (coming later), offer ways for individual libraries to evaluate existing assets and opportunities for growth and change.

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The comprehensive nature of the considerations asked within the Inclusive Services Assessment and Guide is overwhelming. All communities are unique and therefore each library will use this guide differently. This tool might be used as an annual reflection, or utilized more often. The tool might be used as a whole, or by prioritizing sections. First and foremost, the Inclusive Services Assessment and Guide is meant to assist the library in better understanding how it considers inclusion as an institution. Each library needs to determine how to connect with the tool and process the reflections it provokes. In addition, each library will determine how to best share its efforts.

In developing the Inclusive Services Assessment and Guide, attention was given to language and sensitivities of groups and individuals. Terms and phrasing used in this document will likely need to be updated in response to evolution of language and society. A glossary will be provided in the final version of this resource.

Beta Version of the Inclusive Services Assessment and Guide

This initial version, the first of its kind, was designed to have a period of response from the public library professional community. Input on every aspect of the document is welcome through December 31, 2018 and can be shared by individuals using this Google Form: https://goo.gl/forms/9se1jZagoaSMAiuj1.

Who Is Responsible? Service Providers and Policy

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. Use the Scoring Rubric to score each section. See "How to Use the Inclusive Services Assessment and Guide" for examples.

Governance

Y N IP NA 1. Does the Library Board reflect the demographics of the community?

Y N IP NA 2. Is the need for diversity among Library Board trustees communicated to the municipal governing body who makes trustee appointments (mayor/city council, village president/board, county executive, etc)?

Y N IP NA 3. Are the bylaws available in the languages spoken by the community, including braille if necessary?

Y N IP NA 4. Are the bylaws written in gender-neutral language?

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Y N IP NA 5. Do the bylaws have language on equity and inclusion being foundational to the purpose of the library?
Y N IP NA 6. Does the library regularly review all policies to determine if they are creating unnecessary barriers?
Y N IP NA 7. Are policies regularly updated to reflect the needs of the community the library serves?
Y N IP NA 8. Are the policies accessible to all members of the community, including language spoken, reading ability, etc.?
Y N IP NA 9. Do the policies refer to patrons in a respectful, gender-neutral, unbiased way?
Y N IP NA 10. Does the library offer meeting space at the library for diverse community group meetings to take place?
Y N IP NA 11. Does the library budget reflect the values of the community?
Y N IP NA 12. When creating or revising the Library Director position description, are members of the community who reflect the population demographics included?
Y N IP NA 13. Is inclusion reflected in the Library Director position description (e.g. created with input from the Hmong community)?
Y N IP NA 14. Is the Library Director position description gender-neutral?
Y N IP NA 15. Is the Library Director position description translated into the languages spoken by the community, including Braille if necessary?
Y N IP NA 16. Is community demographic information included in the Library Director job advertisement?
Y N IP NA 17. Does the Library Director job advertisement include a description of the ADA-accessibility of the library facility/facilities?
Y N IP NA 18. Do Library Director candidates have an opportunity to meet community members who reflect the population demographics?
Y N IP NA 19. Are members of the community included in the decision-making process of choosing the new Library Director?
Y N IP NA 20. Upon hire, are there opportunities for the new Director to meet members of the community not just at the library, but through invitations to events or places of the community's choosing? (e.g. a PrideFest celebration, a Hindu service, the local Irish bar, a rehab center, etc.)
Y N IP NA 21. Does the Library Director's evaluation tool ask how they interact with members and organizations reflecting the demographics of the community?
Y N IP NA 22. Does the evaluation instrument ask how the Library Director is interacting with members and organizations reflecting the demographics of the community?
Y N IP NA 23. Are salaries equitable for all staff?
Y N IP NA 24. Are part-time staff salaries equitable with salaries for those working full-time in similar positions?
Y N IP NA 25. When the Library Board begins to develop its strategic plan, are community members that reflect the demographics of the community invited to participate?
Y N IP NA 26. Are inclusive services goals and objectives included in the strategic plan to meet the community's needs?

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Administration

Y N IP NA 1. Has the Library Director ensured that the Inclusive Services Statement is shared with new board members when they are appointed to the Library Board?
Y N IP NA 2. Do written procedures include the library's primary commitment to equitable service to all patrons?
Y N IP NA 3. Does the Library Director make the Library Board and/or Trustees aware of upcoming library-related continuing education related to inclusive services?
Y N IP NA 4. Does the Library Director present updates to the Library Board of services, programs, and issues related to inclusive services?
Y N IP NA 5. Has the Library Director studied and shared the impact of fines on low-income families with the Board?
Y N IP NA 6. Has the Library Director had an open discussion with the library board, management team and staff to be assured that they understand the importance of funding for diverse trainings, programs and collections?
Y N IP NA 7. Does the Library Director actively engage with diverse community groups?
Y N IP NA 8. Does the Library Director attend community meetings that address the needs of diverse members of the community?
Y N IP NA 9. Does the Library Director have opportunities to participate in professional activities such as continuing education opportunities?
Y N IP NA 10. Does the Library Director integrate inclusivity practices into recruiting, screening, hiring, and retaining staff?
Y N IP NA 11. Is the Library Director aware of professional development opportunities in relation to inclusive services for self and staff?
Y N IP NA 12. Does the Library Director encourage active staff participation in their library system's inclusivity programming?
Y N IP NA 13. Does the Library Director promote inclusive services planning at the county and system level?
Y N IP NA 14. Does the Library Director consider inclusive services in the technology plan?

Staffing

Y N IP NA 1. Do library staff have a general understanding of basic inclusivity standards?
Y N IP NA 2. Are all library staff able to explain library policies to the public?
Y N IP NA 3. Are all library staff well trained in procedures required by their positions?
Y N IP NA 4. Do library staff project an image of competence and courtesy?

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Y N IP NA 5. Do library staff communicate and work effectively with other staff?
Y N IP NA 6. Do library staff evaluate and measure the effectiveness of library programs and services?
Y N IP NA 7. Do library staff assist in library planning efforts?
Y N IP NA 8. Do library staff use current and emerging technologies?
Y N IP NA 9. Do library staff participate in the political and social structure of the community?
Y N IP NA 10. Are all library staff trained in emergency protocols and procedures?
Y N IP NA 11. Are all library staff, volunteers, and trustees trained in patron privacy and confidentiality?

What the Library Has to Offer

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Collections

A person's ethnicity, age, citizenship, immigration status, literacy or education level, ability, family structure, income level, LGBTQ/gender identity or expression, sexuality, housing status, neurodiversity, style of dress, military status, or any other dimension of identity should neither negatively influence nor interfere with access to the library collection.

This checklist applies to all collection areas of the library.

Y N IP NA 1. Does the collection development policy have a statement about inclusion?
Y N IP NA 2. Does the collection reflect the community's tastes, beliefs, or attitudes?
Y N IP NA 3. Does the collection challenge the community's tastes, beliefs, or attitudes?
Y N IP NA 4. Is the community involved in building and advising on the content of the collection?
Y N IP NA 5. Are multiple sources, representative of diverse communities, consulted while building the collection?
Y N IP NA 6. Does the collection include storylines and characters by and from diverse groups (racial, ethnic, gender identity/expression, sexual identity, disability, veteran status, education level, etc.)?
Y N IP NA 7. Does the collection include accurate, respectful, and current information by and about diverse groups as fact, characters in a storyline, or settings and contexts? (racial, ethnic, gender identity/expression, sexual identity, disability, veteran status, education level, etc.)
Y N IP NA 8. Does the collection include resources for furthering education (GED, ACT/SAT test prep, etc.)?
Y N IP NA 9. Does the collection include titles for self-improvement in skills?
Y N IP NA 10. Does the collection provide materials for people of varied education levels and literacy/English language skills?
Y N IP NA 11. Does the library subscribe to or offer materials for language learning?
Y N IP NA 12. Is the collection in multiple formats [i.e. books, audio books, large print, graphic formats, materials in braille, braille and print combination, narrated TV programs and movies, tangible materials (toys, tools, and sensory items), and audiovisual]?
Y N IP NA 13. Is the collection accessible to people with sensory, ambulatory, social, emotional, and intellectual differences?
Y N IP NA 14. Are databases and other e-resources accessible through alternative means (i.e. screen readers, magnification, closed captioning, and assistive devices)?
Y N IP NA 15. Does the collection contain items in languages other than English?
Y N IP NA 16. Does the collection include titles for "hi-low" readers; such as adults who read at a middle school level?
Y N IP NA 17. Does the library offer various audiobook formats, such as CDs, downloadable audiobooks, and eBooks?

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Y N IP NA 18. Does the library offer audio-described movies and television programs (formatted to include a narration of events for which there isn't a dialogue) on DVD?

Programming

Programming may include policies, planning, and execution of educational, recreational, informational and cultural programs.

Y N IP YA 1. Does the library have a written programming policy?
Y N IP YA 2. Does the programming policy include a diversity or inclusivity statement?
Y N IP YA 3. Does the library offer programming at different times of day and various days of the week, including nights and weekends?
Y N IP YA 4. Does the library offer programming in languages other than English?
Y N IP YA 5. Are people able to participate in library programming whether or not they have a library card?
Y N IP YA 6. Does the library include an inclusivity statement on promotional materials?
Y N IP YA 7. Does the library include a diverse group of community members in the development of programs?
Y N IP YA 8. Does the library plan programs based on community needs and interest?
Y N IP YA 9. Does the library collaborate with established community organizations when planning and promoting programs?
Y N IP YA 10. Does the library provide ADA accommodations for presenters and program attendees?
Y N IP YA 11. Does the library provide a clear path for persons to request ADA accommodations that will enable them to participate fully in library programs?
Y N IP YA 12. Are there multiple avenues available for program attendees to provide feedback?
Y N IP YA 13. Does the library offer programming for the diverse audiences listed in the introduction?
Y N IP YA 14. Does the library contract with performers, authors, and presenters from the diverse audiences listed in the introduction?
Y N IP YA 15. Does the library provide traditional and non-traditional creative programming to attract and meet the needs of non-English speaking persons in the community?
Y N IP YA 16. Does the library offer free programs related to work and life skills development, as well as cultural and recreational presentations through local partnerships, volunteers, or contracted performers for people of all ages?
Y N IP YA 17. Are there free classes for people who want to learn and improve their English or literacy skills?
Y N IP YA 18. Does the library offer programs that celebrate a wide variety of heritages and cultural events?

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Services

Services may include physical resources/equipment that allow individuals to make use of the library or they may be the intrinsic way that staff interact with patrons.

Y N IP NA 1. Does the library use programs, literature, and publicity in creative ways and in a variety of settings to attract those for whom libraries are not part of their life experience?
Y N IP NA 2. Does the library provide programs and services about gender identity, gender expression, or sexual orientation?
Y N IP NA 3. Does the library avoid asking about gender on forms, or dividing activities based on gender?
Y N IP NA 4. Does the library create pathfinders, subject guides or reader's advisory bookmarks related to topics of interest to diverse communities (LGBTQ, immigrants, neurodiverse people, etc.)?
Y N IP NA 5. Do library displays regularly include materials by and about diverse groups (people of color, LGBTQ, people with disabilities, etc.)?
Y N IP NA 6. Does the library offer discreet information, such as shortcuts to local services on computer desktops, about PTSD and other sensitive topics?
Y N IP NA 7. Are resources available for all community members?
Y N IP NA 8. Does the library provide visual schedules of library events or due dates of materials?
Y N IP NA 9. Does the library provide visual timers for program or computer scheduling?
Y N IP NA 10. Does the library provide touch screen devices for internet or communication purposes?
Y N IP NA 11. Does the library provide adaptive technologies, such as screen readers, text to speech software, adaptive mice, and magnifiers?
Y N IP NA 12. Does the library provide fidgets (small manipulatives, such as soft balls, that fit safely and comfortably in the hand) for neurodiverse patrons?
Y N IP NA 13. Does the library provide sensory storytimes or programs for children?
Y N IP NA 14. Does the library provide inclusive seating options, such as the option to sit at the front of the room, space for wheelchairs, or space to stand, during library programs and activities?
Y N IP NA 15. Does the library offer personal FM or other listening devices during presentations?
Y N IP NA 16. Does the library help non-English speaking immigrants understand and interact with the culture, government, and educational system of the United States, via resources and services offered?
Y N IP NA 17. Is there information on free legal assistance and financial counseling for people interested in becoming US Citizens and information on free legal services for immigrants?

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Y N IP NA 18. Do programs and services reflect the local immigrant community needs and offer a variety of print materials (books, magazines, newspapers), as well as media (CDs, DVDs) in the language of the immigrant community for all ages, and online resources?

Y N IP NA 19. Are there programs and resources readily available for teen parents?

Y N IP NA 20. Are there multigenerational family literacy programs for children and their parents, grandparents, and caregivers?

Y N IP NA 21. Are programs and materials presented in both English and other prevailing languages within the community?

Y N IP NA 22. Is there a community space/meeting room that all groups are welcomed to reserve?

Y N IP NA 23. Are there Advisory Boards to allow the library to better understand the needs and interests of various populations (teens, seniors, underrepresented populations, etc.)?

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Where the Interactions Take Place

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Facility

Outdoor Spaces

Y N IP NA 1. Does public library parking meet the requirements of the Americans with Disabilities Act (ADA)?
Y N IP NA 2. Is the parking area well lit?
Y N IP NA 3. Is library parking free?
Y N IP NA 4. Is parking convenient to library's entrances?
Y N IP NA 5. Are bicycle racks convenient to the building entrances?
Y N IP NA 6. Does the book return meet the requirements of the Americans with Disabilities Act (ADA)?
Y N IP NA 7. Is the book return accessible 24/7?
Y N IP NA 8. Does the book return accommodate access by cars and pedestrians, including pedestrians using wheelchairs?
Y N IP NA 9. Does the outdoor signage meet the requirements of the Americans with Disabilities Act (ADA)?
Y N IP NA 10. Does the library have wayfinder signs with pictograms?
Y N IP NA 11. Is the entrance signage in languages spoken in the community, as well as pictograms?
Y N IP NA 12. Do the library walkways meet the requirements of the Americans with Disabilities Act (ADA)?
Y N IP NA 13. Are walkway surfaces safe and uniform?
Y N IP NA 14. Are the library's outdoor spaces easily accessible, and if there is outdoor equipment (picnic tables, playground equipment) is it wheelchair accessible?
Y N IP NA 15. If there are signs/activities/etc. for outdoor spaces, are they welcoming to all?
Y N IP NA 16. Do all entrances and exits meet the requirements of the Americans with Disabilities Act (ADA)?
Y N IP NA 17. Does the library entrance have an electronic door opener?
Y N IP NA 18. Do all emergency exits meet state/municipal building codes?
Y N IP NA 19. Do all entrance and interior doors have adequate clearance?
Y N IP NA 20. Are the security gates wide enough to accommodate a wheelchair?
Y N IP NA 21. Does the entryway have level, clear and slip-resistant flooring?

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Indoor Spaces (General)

Y N IP NA 1. Is there an elevator when the facility is on multiple levels?
Y N IP NA 2. Does the elevator meet ADA requirements and state/municipal building codes?
Y N IP NA 3. Are elevator signs and controls in multiple languages, including Braille?
Y N IP NA 4. Does the elevator have auditory signals?
Y N IP NA 5. Does emergency/safety equipment meet ADA requirements and state/municipal building codes?
Y N IP NA 6. Is there a visual indicator for emergency alarms?
Y N IP NA 7. Are points of service easily identified?
Y N IP NA 8. Is the equipment in public spaces accessible?
Y N IP NA 9. Does the library provide a variety of options for quiet study and privacy?
Y N IP NA 10. Are floors carpeted (rather than hard floors) to reduce noise from moving chairs/furniture?
Y N IP NA 11. Are carpets appropriately secured to the floor?
Y N IP NA 12. Is the library free of obstructions for those with mobility aids?
Y N IP NA 13. Are all levels of the library connected via an accessible route of travel?
Y N IP NA 14. Are sight lines adequate throughout?
Y N IP NA 15. Are there adequate outlets?
Y N IP NA 16. Are youth spaces designed to be considerate of size and usage?
Y N IP NA 17. Does the library provide allocated space for people who are nursing/pumping?
Y N IP NA 18. Are there measures in place for patrons and staff sensitive to overstimulation?
Y N IP NA 19. Are there measures in place for patrons and staff sensitive to scents?
Y N IP NA 20. Is there space that can be used for prayer or meditation?
Y N IP NA 21. Is it clear that service animals are welcome in the library?
Y N IP NA 22. Are gallery spaces and display cases accessible?
Y N IP NA 23. Is there adequate lighting throughout the library space?
Y N IP NA 24. Is there adequate seating throughout the library space?
Y N IP NA 25. Are the service desks the appropriate height for adults, children, and wheelchair access?
Y N IP NA 26. Are there assistive technologies available?
Y N IP NA 27. Is there self-checkout, accessible by wheelchair?
Y N IP NA 28. If there is a self-checkout, does it display instructions in multiple languages?
Y N IP NA 29. Is seating available for customer/staff consultation?
Y N IP NA 30. Is adequate space allowed for customer use of reference materials?
Y N IP NA 31. Do the service desks provide separate or acoustically isolated spaces for the following services: Interlibrary loan, database searches, general information, customer interviews, photocopiers?
Y N IP NA 32. Are there technologies available to make it easier to hear in meeting/event spaces (eg: microphones, sound systems, hearing loops)?
Y N IP NA 33. Are assistive technologies available in meeting/event spaces?

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Y N IP NA 34. Is there adequate and adjustable lighting in meeting/event spaces?
Y N IP NA 35. Is there comfortable adult seating for use while adults are sharing books with children?
Y N IP NA 36. Is the floor a single level to allow for flexibility in programming and accessibility, as well as to avoid injuries?
Y N IP NA 37. Has sufficient space been allowed for easy access by children if materials are checked out or returned at the children's desk?
Y N IP NA 38. If children's and adult circulation counters are separated, is there lower counter space set aside for children, visibly marked by large graphics?
Y N IP NA 39. Although there should be imaginative pieces of furniture, cheerful colors, etc. is there a space for individuals who require less stimuli?
Y N IP NA 40. Is there a quiet corner where children can retreat from the program without leaving the room?
Y N IP NA 41. Is there a separate programming area out of the traffic flow?
Y N IP NA 42. Is there secure and adequate space to store teen gear such as skateboards and backpacks?
Y N IP NA 43. Are there physical resources available to use when the library is closed (wifi, drinking fountain, outlets, public phone, restroom)?

Meeting Room/Event Space

Y N IP NA 1. Is the meeting room entry close to the main entrance? If not, is the path clear for ease of access?
Y N IP NA 2. Are there window coverings in the meeting room/event space?
Y N IP NA 3. Can the meeting room area be closed off from the remainder of the library? If not, what options can be explored to separate that space to avoid audio, visual, or other interruptions (example: folding partitions)?
Y N IP NA 4. Are there blackboards and/or white marker boards?
Y N IP NA 5. Are the chairs and tables light enough to be moved and maneuvered by patrons and staff?

Computers and Technology

Y N IP NA 1. Are assistive technologies available?
Y N IP NA 2. Are video transcripts available?
Y N IP NA 3. Does the library have wheelchair accessible tables and computer workstations?
Y N IP NA 4. Are laptops available to use in the library?
Y N IP NA 5. Are keyboards ergonomically designed?
Y N IP NA 6. Are high contrast keyboards available?
Y N IP NA 7. Are computer monitors shielded from direct sunlight or glare?
Y N IP NA 8. Does the library have print-to-speech scanners?
Y N IP NA 9. Are braille embossers available?

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Y N IP NA 10. Are talking book readers available?
Y N IP NA 11. Are low tech options available (i.e. magnifier sheets, magnifying glasses, flashlights, table lamps, etc.)?
Y N IP NA 12. Are written transcripts of tutorials and videos on the library Web site available for both English speakers and others?
Y N IP NA 13. Are apps available that can provide conversation practice?
Y N IP NA 14. Does the library provide internet access and personal computing applications to patrons free of charge and regardless of library card status?
Y N IP NA 15. Does the library provide workspaces that offer patrons the opportunity to use online services?
Y N IP NA 16. Does the library provide free wireless internet access?
Y N IP NA 17. Is the library flexible with time restrictions on computer use to allow users to complete desired tasks?
Y N IP NA 18. Does the library avoid restricting activities users can engage in on the computers that may impact their ability to complete desired tasks?
Y N IP NA 19. Can users borrow mobile wifi units?
Y N IP NA 20. Can users borrow mobile devices?
Y N IP NA 21. Does the library avoid restrictions or limits on printing or making copies that may impact users' ability to complete desired tasks?
Y N IP NA 22. Are written transcripts of tutorials and videos on the library Web site available in simplified language (i.e. not children's version)?
Y N IP NA 23. Can users adjust the reading level of information?
Y N IP NA 24. Are workstations staggered to enhance noise control?
Y N IP NA 25. Does the library provide ergonomic workstations/ chairs for users and staff?
Y N IP NA 26. Is a staff member managing upgrades to software to ensure products contain the latest accessibility tools?
Y N IP NA 27. Are there apps available that assist with social skills?
Y N IP NA 28. Are there lightweight and/or portable devices offered as alternatives to workstations?
Y N IP NA 29. Are strategies in place to assist users with using the library's wireless network?
Y N IP NA 30. Can users bring their own adaptive devices and/or check out adaptive technology equipment for home use?
Y N IP NA 31. Are alternative mouses or touch pads available (senior mouse, jelly bean switch, etc.)?
Y N IP NA 32. Are workstations staggered to enhance privacy?

Collection Spaces

Y N IP NA 1. Are there a variety of display options (sloping shelves, spinners, etc.)?
Y N IP NA 2. Are there no more than eight 36-inch sections of shelving without a break?
Y N IP NA 3. Does length of shelving and width of aisles take traffic patterns and accessibility into consideration?
Y N IP NA 4. Is there a method for accessing high shelves for those unable to reach?

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Y N IP NA 5. Are shelving units sturdy? Braced or anchored?
Y N IP NA 6. Are all stacks and shelves clearly labelled?
Y N IP NA 7. Are stack labels large enough to be seen?
Y N IP NA 8. Are there braille shelf markers?
Y N IP NA 9. Are there special features like built-in lighting?
Y N IP NA 10. Is there a clear distinction between floors and walls to assist the visually impaired?
Y N IP NA 11. Are any stacks labelled in any non-dominant languages?
Y N IP NA 12. Have visual cues (photos, illustrations) been used to identify stack contents?
Y N IP NA 13. Are shelving units smoothly finished with no sharp edges?
Y N IP NA 14. Are there accessories to display and house a variety of material types (compact discs, oversized and miniature materials, odd-shaped items, etc.)?
Y N IP NA 15. Is there a minimum of 36 inches between stacking shelves?

Restrooms

Y N IP NA 1. Does the facility have wheelchair accessible restrooms and are the restrooms well marked with signs indicating they are wheelchair accessible?
Y N IP NA 2. Are restrooms marked with pictograms for those who cannot read English?
Y N IP NA 3. Are there gender-neutral restrooms available?
Y N IP NA 4. Do single occupancy restroom facilities use gender-neutral signage for those facilities?
Y N IP NA 5. Are gender-neutral restrooms available on all floors/service areas?
Y N IP NA 6. Are auxiliary areas and items such as restrooms and drinking fountains scaled for children located in the children's area?
Y N IP NA 7. Do all of the restrooms include an area for changing diapers?
Y N IP NA 8. Are there adult changing stations available?

Staff Areas

Y N IP NA 1. Do library staff have access to hearing aid and volume control telephones?
Y N IP NA 2. Is there an area with reduced distractions for staff to work?
Y N IP NA 3. Are white noise or environmental sound machines acceptable or available for use?
Y N IP NA 4. Does the library provide ergonomic workstations for staff?
Y N IP NA 5. Are counters/tables at a comfortable height as to avoid injury from lifting?
Y N IP NA 6. Are there secure spaces for staff's professional and personal use (i.e. lockers)?
Y N IP NA 7. Are employee posters clearly posted and available in other languages and formats?

Access

Location, Hours, and Services

Y N IP NA 1. Is the library located near public transportation and community services?

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Y N IP NA 2. Are library hours fixed and prominently posted?
Y N IP NA 3. Are open hours based on community need?
Y N IP NA 4. Do library hours cater to the different shifts that people work? E.g. Does someone who works third shift have access to the library?

Library Card Registration

Y N IP NA 1. Are written materials available with step-by-step instructions to assist patrons with new library card registration?
Y N IP NA 2. Is there a work surface/work space that is easily accessible to patrons to allow them to register for a library card?
Y N IP NA 3. Does the library provide training for staff to assist visually-impaired patrons and those who do not read with library card registration?
Y N IP NA 4. Are library card applications printed in multiple languages?
Y N IP NA 5. Does the library charge for a library card or replacement card?
Y N IP NA 6. When creating a new card, does the library accept something other than a photo ID as proof of identity, and offer to send a postcard so people can have proof of address?
Y N IP NA 7. Does the library card application form avoid requiring binary gender identification?
Y N IP NA 8. Does the library card registration application instruct patrons to notify the library of preferred name (even if the name has not been legally changed), i.e. individual transitioning.

Online Access (Website and Catalog)

Y N IP NA 1. Is the library website ADA compliant?
Y N IP NA 2. Are there captions for any video content?
Y N IP NA 3. Can content be converted to large print, braille, speech, symbols?
Y N IP NA 4. Can content be converted to simpler language and multiple languages?
Y N IP NA 5. Is information displayed in simple layouts and menus (i.e. not communicated solely by structure, color or graphic design?)
Y N IP NA 6. Is the Web portal free of flickers and an excess of color?
Y N IP NA 7. Does the website contain welcoming language for all sexualities and genders?
Y N IP NA 8. Are there textual descriptions for any photographic content?
Y N IP NA 9. Does the Web content work with different devices?
Y N IP NA 10. Can the information be accessed through keyboard only (no mouse required)?

How Does the Library Engage With the Community?

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. Use the

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Scoring Rubric to score each section. See "How to Use the Inclusive Services Assessment and Guide" for examples.

Marketing

Y N IP NA 1. Do the graphics on library promotional materials include people from a range of ethnicities, genders, religions and abilities?

Y N IP NA 2. Does the library follow social media related to a wide array of diverse populations and create content for the same diverse populations?

Y N IP NA 3. Do library social media profiles or accounts include content that would be beneficial to all people?

Y N IP NA 4. If the library provides accommodations for those with disabilities, do promotional materials communicate that, along with a clear path for requesting accommodation?

Y N IP NA 5. Does the library place marketing materials where people from different backgrounds are likely to see them?

Y N IP NA 6. Is the content of the library's marketing materials accessible to diverse populations?

Community Engagement

Y N IP NA 1. Does the library regularly analyze the demographics of the community in which it is located?

Y N IP NA 2. Does the library involve patrons, residents, local businesses and other key organizations and stakeholders when preparing the strategic plan?

Y N IP NA 3. Has the library identified the needs and issues of specific groups in the community in collaboration with them?

Y N IP NA 4. Does the library have multiple formats for receiving feedback from diverse community groups that account for potential barriers?

Y N IP NA 5. Is the library responsive to the feedback from groups and individuals in underrepresented communities?

Y N IP NA 6. Does the library work with community ambassadors to help promote the library?

Y N IP NA 7. Does the library have meaningful engagement and collaboration with neighborhoods, local organizations and businesses, with a set of shared priorities for the library and community?

Y N IP NA 8. Does the library seek out and engage with underrepresented communities to make sure that everyone feels welcome at the library?

Y N IP NA 9. Does the library work with organizations in the community to facilitate reciprocal sharing of information about programs, collections/materials and resources to the diverse populations in the community? (PFLAG, NAMI, ADRC, food pantries, housing assistance, etc.)

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Y N IP NA 10. Does the library send staff to represent the library at meetings and events held by the various organizations in the community? (county/city youth coalitions, health or human services coalitions, Pride celebrations, heritage festivals, etc.)

Y N IP NA 11. Does the library collaborate with other institutions to ensure library service for people who can't come to the library (senior housing, assisted living, juvenile or adult detention, shelters/transitional housing, etc.)?

Y N IP NA 12. Does the library offer resources for people who are reintegrating into the community after incarceration?

Y N IP NA 13. Does the library work with other organizations (Lion's Club, Friends group, Community Center, etc.) to provide free food at library events, or summer lunch programs for children?

Funding

Y N IP NA 1. Does the library budget include funds for cultural competency and anti-bias training for library staff and volunteers?

Y N IP NA 2. Does the library budget include funds for cultural competency and anti-bias training for the Board of Trustees, Friends board members and Foundation board members?

Y N IP NA 3. Does the budget include funds for programming geared to the diverse groups in the community?

Y N IP NA 4. Does the budget include funds for purchasing materials for the collection that reflect the diversity in the community and beyond?

Y N IP NA 5. Does the budget allow for staff hours to spend outside the library connecting and providing services with diverse groups and populations?

Y N IP NA 6. Does the budget include funds for recruiting staff and volunteers of color?

Y N IP NA 7. Does the budget include funds to offer culturally relevant digital resources that have been reviewed and evaluated by peer reviewers?

Y N IP NA 8. Does the library seek out supplemental funding via grants, foundations and a Friends of the Library group to cover the costs of trainings, programs and special collections?

Y N IP NA 9. Does the library have a list of community members who would be willing to donate to the library or advocate for the library to have the diverse trainings, programs and collections?

Self Care for Library Workers

In order for library workers to provide consistent, empathetic, and sustainable service to their community, they must be able to attend to their own needs. Library administration needs to value the importance of creating an expectation of self-care among staff, as well as for themselves. [We'll include a link to appendix for further individual assessment tools]

DRAFT

Y N IP NA 1. Is library staff encouraged to take breaks during their shifts?
Y N IP NA 2. Is library staff encouraged to take time away from the library?
Y N IP NA 3. Is library staff encouraged to create healthy boundaries between work and home life?
Y N IP NA 4. Does library administration respect staff work and home boundaries?
Y N IP NA 5. Is library staff encouraged to take breaks from programming or on-going services?
Y N IP NA 6. Is library staff encouraged to take time to reflect on programming and on-going services?
Y N IP NA 7. Is library staff encouraged to take time to reflect on or process library incidents or stressors?
Y N IP NA 8. Does library administration support self care behaviors of library staff?

Inclusive Culture at the Library

The library culture is integral to providing inclusive services. These considerations provide ways to enrich culture and foster professional development as individuals and organizationally.

Y N IP NA 1. Do library staff have an understanding of what inclusivity means to the members of their community?
Y N IP NA 2. Does library administration have conversations with staff about being an inclusive library?
Y N IP NA 3. Are staff members properly trained to deal with the diverse populations in their community?
Y N IP NA 4. Does staff adhere to core values of creating an inclusive environment at their library?
Y N IP NA 5. Does staff put the customer/patron first?
Y N IP NA 6. Are staff tasks focused on providing the best possible service?
Y N IP NA 7. Is there a teamwork mentality in creating an inclusive environment at the library?
Y N IP NA 8. Is there an atmosphere of respect among staff members and members in the community?
Y N IP NA 9. Does everyone respect the decisions and choices made by the board and administration regarding community engagement and inclusivity at the library?
Y N IP NA 10. Does staff make thoughtful decisions in dealing with patrons and members of the community as part of their daily work routine?
Y N IP NA 11. Is there a measurement in place to track expected outcomes regarding community engagement and relationship building in their community?

DRAFT

Scoring Rubric

1. To score each section, give each answer the following number value:
    - Give each "Y" circled in the section a score of 1
    - Give each "N" circled in the section a score of 0
    - Give each "IP" circled in the section a score of 0.5
    - Give each "NA" circled in the section a score of 1

2. Add up the scores in each section to get a "raw score." For example, add up the scores of all of the answers in the Governance section, based on what was circled for each consideration. Because there are 26 considerations in that section, there is a maximum score of 26.

3. When you have scored a section, enter the raw score in the appropriate column on the scoring rubric.

4. Continue this process until all sections are scored.

[NOTE to reviewers: the green numbers in the "raw score" column are for illustrative purposes only. This column will be blank on the actual tool.]

https://docs.google.com/spreadsheets/d/144Za8FiQt-INoaI93CzQrsgyfdjGditjtodivYl2hll/edit?usp=sharing

Remember that this is a self-evaluation tool. The scoring rubric is designed to help libraries to identify areas of strength, and of areas that may require some focus. One library may determine that a comparatively low score in the "Facility" section is worth the investment of time and money, while another library may choose to focus on a lower score in an area that requires less costly improvements, such as Governance. Only the local library board and staff can make that determination. This scoring rubric is intended as a prioritization aid.

DRAFT

Reflection Worksheet

Section to be addressed:

1. Describe how this looks in your library right now:

2. How do you want this to look in the future?

3. Why is this important to your library and community?

4. What steps do you need to take towards this future?

    - What assets do you have to work on this topic?

    - What information do you have or need to work on this topic? E.g. demographic data, anecdotal data, survey results, acknowledging invisible populations?

    - What is the feasibility of making changes?

5. With whom will you share this reflection? How and when?

DRAFT

Appleton Public Library

APL Strategic Plan

Our strategic plan is a community-centered project, designed to create a successful path for the Appleton Public Library's future. This path is built upon the past achievements of the library, which includes providing over $24 million worth of programs and services to the community in 2014, with a public service return on investment of $5.95.

Hub of Learning and Literacy

We connect our community with opportunities for growth, self-instruction and inquiry. We recognize reading as the heart of the library's mission and also expand beyond it to offer our community additional ways to improve and develop.

Collaborative Environment

We celebrate our diverse community, serving as a place where understanding can grow. We work with many partners, allowing our entire community to benefit from shared knowledge and information.

The Future: Children and Teens

We provide youth of all ages in our community with programs and services that are age-appropriate, dynamic and inspiring. We ensure that families from all backgrounds find a supportive and strengthening place for their futures.

Creation and Innovation

We honor imagination, invention, and inspiration. We provide people, places and platforms to encourage discovery, development and originality.

Engaged and Sustainable Organization

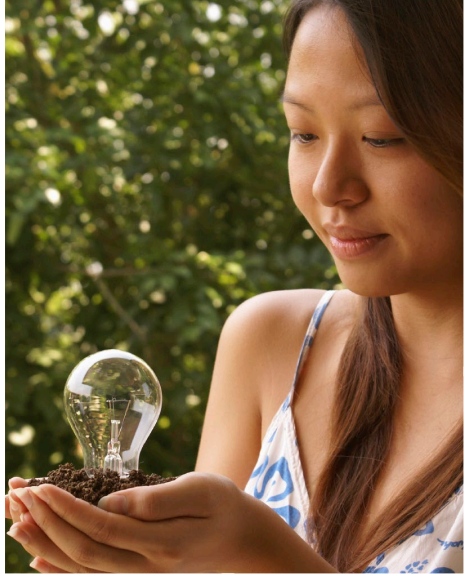
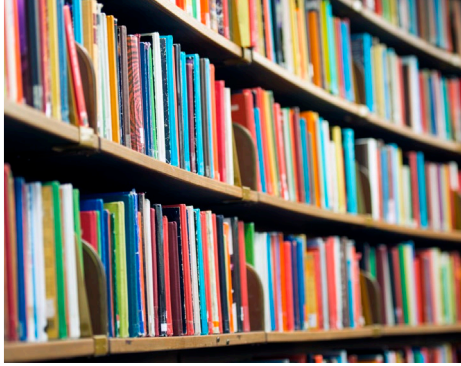
Our knowledgeable and creative staff provides a patron experience that represents and aids our diverse community. We work closely with many organizations and partners to benefit those we serve.

Enriched Entertainment

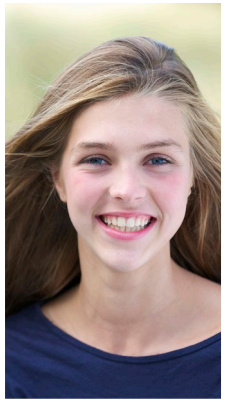
We embrace the important role of entertainment in the lives of our community members and its ability to enhance and enrich our lives. We maintain a collection that covers the breadth of changing interests, technologies and formats.

Specialized Services and Programs

We support and sustain education for all ages. We address the varied needs within our community by offering targeted assistance for diverse populations.

Appleton Public Library



2013 Appleton Public Library Strategic Plan

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APL150 | The Process

We believe that the Appleton Public Library ("APL") has continued to play a vital role in our community. With annual circulation of well over a million volumes, a growing number of e-book uses now in the tens of thousands per year, and tens of thousands of participants in library programs each year, we have striven to be responsive to the changing demands of our service population.

Almost two years ago, the Board of Trustees and the Friends of APL ("Friends") decided that we should globally analyze the demands which our community is likely to place on the library as we approach our 150th anniversary in 2047. Our plan is to take all of our research and investigation into consideration in judging how our facility can be adjusted to meet the changing demands.

Our investigation has been rigorous and as comprehensive as we could plan. It started in April 2012, when we began a series of what we called Community Conversations. These 20 focus groups called together diverse members of our community to address what were their hopes and aspirations for our library in the future.

In March 2013, we brought in an urban planner, Tony Nelessen, who gave a well attended public presentation on the future of cities like Appleton, and the role an institution like our library is likely to play.

In April 2013 we brought another speaker, a futurist named Gary Golden, who more specifically looked at the likely future functions of a public library. This presentation was also well attended by the public.

Over the last year we have also visited libraries that are known for providing high quality, 21st century library service.

The staff at APL made very impressive presentations of what they believe the future holds for the services for which they are responsible.

Finally we convened a 10 member Community Advisory Committee which met several times over the summer months, brainstorming over the future of the library and the nature of the immutable services we provide. This volume provides the fruits of our last year and a half of labor.

Personally, one conclusion I have reached is that the core of the library is as a community asset to promote lifelong learning. My other principal conclusion is that, although it might be difficult to define what the specific demands on the library will be in twenty-five years, whatever our 21st century library becomes, it must be designed to be responsive to rapidly changing technology and environments. It should also be a facility that stirs the public imagination and leads by example.

It has been a very interesting and exciting time for those of us involved, and we hope this material allows our Board of Trustees, the City of Appleton, Outagamie County, and our patrons to plan for the future of the Appleton Public Library.

John Peterson
President | APL Board of Trustees

John Peterson

A letter from the Mayor

The City of Appleton's mission statement states that we are dedicated to meeting the needs of community and enhancing the quality of life. The Appleton Public Library plays a key role in the City's ability to meet that mission. This year the Appleton Public Library has undergone a strategic planning process in a very deliberate way that focused on community input. This new plan reflects the will of the community and speaks directly to some of our greatest strengths in the City of Appleton.

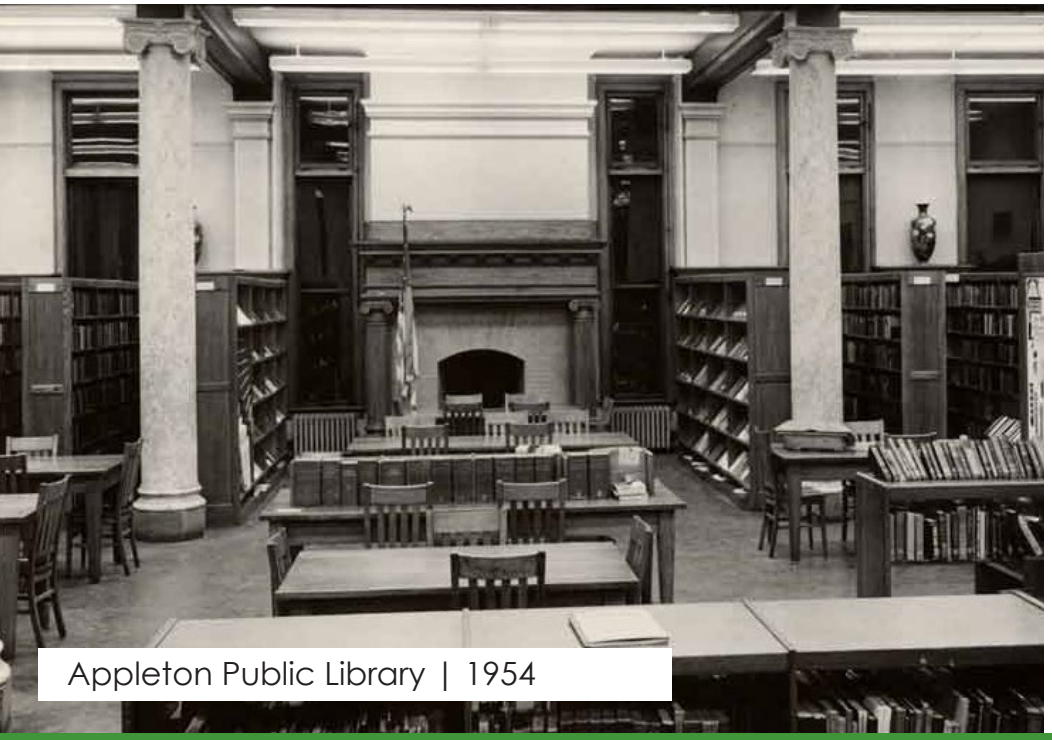
The City is on the verge of a new wave of investment in the downtown and the Appleton Public Library is one of those major investments. It is our responsibility to make sure that the Appleton Public Library is a vibrant regional asset that is poised to serve today's and tomorrow's community members.

With all of the changes happening in public libraries, I applaud the work done by the library Trustees, the library staff and the community. This is a plan that looks to the future...and that's exciting!

Mayor Hanna

Timothy Hanna
Mayor | City of Appleton

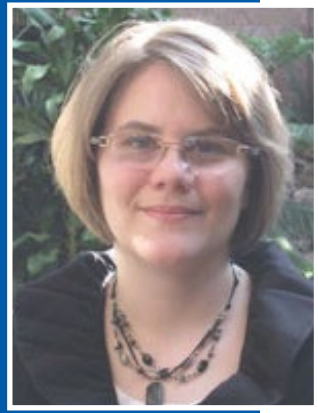
Appleton Public Library | 1887



Appleton Public Library | 1954

Appleton Public Library | 1981

Looking to the Future



Colleen Rortvedt

This is an ambitious plan that aims to reach toward the 150th anniversary of the Appleton Public Library in 2047. That is admittedly a long way off and no one involved in the process realistically thought that we could predict that far into the future with flawless accuracy. Our intention was to create a plan whose mission, vision and services would be flexible and responsive to community needs long into the future by setting the goal this far, to our sesquicentennial, would serve as a constant reminder to Trustees, staff and the community that we are thinking not only about how the library is used today or how it will be used in a few years, but that we are developing a plan of service that we hope will be responsive to the hopes and dreams of the future members of our community who may not even be born yet.

The seven strategies developed through our community-centered process with our advisory committee serve as the building blocks of the services we will offer for years to come. In this document, we have provided local voices that speak to each strategy in hopes that they will help bring them to life. I have to thank the extensive work of the APL staff, our APL Board of Trustees, the Mayor and our city leadership, the Friends of Appleton Public Library, our Community Advisory Committee and the hundreds of you who have been willing to add your voice to this plan either through participating in Community Conversations, our public survey or our Library Futures presentations. Finally, I want to thank the local leaders who contributed directly to this document. Your perspectives and personal experiences speak in a meaningful way that broadens the understanding of each strategy.

Public Libraries are inherently local institutions and we are fortunate in this great community to have an abundance of dedicated community members who expect a great library. I am confident that by following these strategies we will look back and say that we have realized the library's new vision to transform our community's potential into reality.

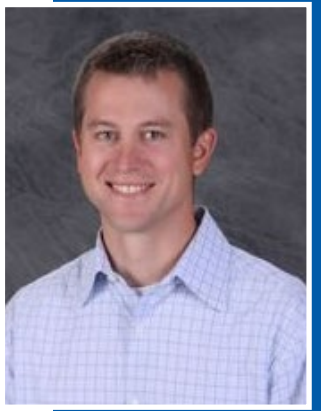
Colleen Rortvedt

Colleen Rortvedt
Director | APL

A Special Thank You

APL 150 is designed to create a path to the successful future of the Appleton Public Library. There was a great deal of input from the community and data from the library world to consider. Once all of this information was collected, a group of leaders needed to get together and determine what to do with all of this feedback. The Community Advisory Committee was this group of leaders. They took on this challenge with intensity and a clarity of focus that was inspiring. Countless hours of preparation and contemplation from a group that went above and beyond what was asked of them. They took ownership of the process and wouldn't rest until they had reached the outcomes that would setup APL for success far into the future.

I was honored to be involved in the process and proud of the work that was accomplished. I believe the CAC will look back on this experience knowing they made a significant impact on the lives of everyone connected to the library and the Fox Valley community.



Ben Fauske
CAC Facilitator

Community Advisory Committee

Carolyn Desrosiers
Harmony Cafe

Jennifer Edmondson
Friends of APL

Tony Gonzalez
United Way - Fox Cities

Melody Hanson
APL Staff Rep

Alderperson Joe Martin
City of Appleton District 4

Debbi Natali
AASD/Einstein Middle School

Mark Priddis
AT&T

MaryKate Schneider
APL Board of Trustees - Teen Rep

Jennifer Stephany
ADI, Inc.

Liz Witek
APL Board of Trustees

APL150 Strategies

Don Hietpas

Just as public schools are seen as the centers of learning in our society for children and young adults of school age, so are public libraries the centers of life-long learning from birth to old-age.

Beginning with young children brought to the library by parents and families, continuing through school years and into adulthood, age appropriate resources and support are available and everyone is welcome. A love of learning, connections to literature, opportunities for discourse, ability to research, analyze, and think critically are paramount to an educated, engaged society which, in turn, is critical to a community in order to progress, grow, and thrive.

Libraries gather some resources and provide access to others and make them available to everyone in the community. The available literature, technology, media, programs, etc., connect people to learning opportunities and contribute to this critical life-long learning process. No other place in the community fills this role to the extent that the library does and nobody does it better.

The Appleton Public Library is truly the "Hub of Learning and Literacy" for the greater Appleton community.

Don Hietpas
Appleton Area School District
APL Board of Trustees
Friends of APL Board

Hub of Learning and Literacy

We connect members of our community with opportunities for growth, self-instruction and inquiry. We recognize reading as the heart of the library's mission and also expand beyond it to offer our community additional ways to improve and develop.

- We serve as a leader in our community, a place for continuous learning to connect people with books, literature and resources that motivate and help them grow. We provide resources to support a love of literature to patrons in all stages of life.
- We provide resources and support for learning and literacy.
- We recognize that literacy is more than just reading and includes a wide range of skills needed for success.
- We develop services and collections by positioning our staff as partners with our community.
- We provide a continuum of high-quality programming for all life stages working with cross-sector community partners to showcase local experts in areas of interest to the community.
- We serve as a bridge to technology offering digital content and guided assistance.
- We provide an agenda-free space for our community to come together.
- We believe equal access is essential to our democratic society and we provide that access to our community.

Collaborative Environment

We celebrate our diverse community, serving as a place where understanding can grow. We work with many partners, allowing our entire community to benefit from shared knowledge and information.

- We are a community-centered institution and strive to develop policies and services that respond to community needs and interests.
- We develop policies, collections and public services that include diverse representation from the community through the Library Board of Trustees, staff, volunteers, patrons and community-at-large.
- We play a key role in resource sharing within the library system and throughout the state.
- We serve as a place of discovery, inspiration, learning, discussion and gathering.
- We create a platform where librarians, community members and organizations can exchange knowledge on topics of interest to the community at large.
- We work with neighbors and the community as a whole to ensure that we offer a safe and welcoming environment.

Libraries of the 21st Century are places where books, as well as programs, policies and services, help people of all ages make sense of and enjoy their world.

Librarians have always been good listeners, responding to the interests and needs of those who visit the library, but librarians of the 21st Century are expanding their roles by getting out into the community, and developing programs and services that reflect the dreams, concerns and desires of the community.

Using the resources of the library, librarians can then address these dreams, concerns and desires, gathering people of diverse skills, talents and backgrounds to share knowledge, create solutions and even entertain.

Along with helping visitors navigate the collection at the library, collaborating with the community to develop meaningful programs and services is an additional responsibility of the 21st Century librarian, and one that the librarians of the Appleton Public Library are eager to embrace.

Renee Boldt
Library Advocate
President, Friends of APL Board

Renee Boldt

MaryKate Schneider

I am currently fifteen years old; a high school student. When the library reaches its 150th anniversary, I will be 49.

APL has been such a catalyst for change in my life, a place in my community where I have felt welcomed and at home. For my little sister's sixth birthday, I took her to get her first library card. I want her, and all other children, to be able to walk into their library and feel like it belongs to them, that they will have the drive to learn and explore and create. I want that for the children I may have.

By being a part of APL I have had the opportunity to meet incredible peers and mentors. I have been able to actually make friends and have fun, something I missed out on when I was younger. Our library has done so much for me, and I have it on good record that I am not the only kid it's made a difference for. I fought for this to be a key part in our plans for the future because we need every child to grow up and feel like they can be something great, which I hope the library helps them achieve.

MaryKate Schneider
Student

APL Board of Trustees -
Teen Representative

The Future: Children and Teens

We provide youth of all ages in our community with programs and services that are age-appropriate, dynamic and inspiring. We ensure that children from all backgrounds find a supportive place at the library for their futures.

- We provide resources from birth through adolescence to inspire a love of learning and literature.
- We provide crucial learning and literacy programs and services for infants, children, teens and their parents.
- We provide a safe, open and engaging environment that is developmentally appropriate for youth in their pursuits of learning and leisure.
- We provide instructional programs and services to offer parents tools and resources to be their child's first teacher.
- We support educational curricula through collaboration with educators and relationships with parents, caregivers and other service providers.
- We participate in community-wide efforts to equalize opportunities for all youth ensuring that collections, services and programs are accessible to the diverse community we serve.

Creation and Innovation

We honor imagination, invention, and inspiration. We implement spaces, collections and programs to encourage discovery, development and originality.

- We provide spaces and community connections which bring creative people together encouraging innovation and collaboration.
- We work with collaborators to instruct, inspire, create and innovate.
- We provide access to resources in a variety of formats including physical materials, digital content, community experts and technology.
- We create spaces and resources for experimentation with creative endeavors and technology.
- We work with the community and local organizations to create, preserve, organize and disseminate local events, history and culture.

The scientist and essayist, Stephen Jay Gould, once said, "My talent is making connections."

The Fox Valley is filled with creative and innovative people like that -- people who make connections -- and the Library is the place for those people to make those connections: with each other, with ideas, with the tools and resources for the creative, innovative things they want to do.

The Library's the place for adults, kids, families, students -- everybody -- to make connections in order to discuss, to learn, to have fun, to create new knowledge.

I'm delighted that Appleton Public Library has decided to make these connections a priority. Our Library is well suited to tackle changing and emerging technologies and to help the rest of us make the best use of them.

Peter Gilbert
Lawrence University
Friends of APL Board
President, OWLS Board

Peter Gilbert

John Larson

The Appleton Public Library has a history of combining public and private funding to provide the community with a very valuable resource that is more than just a traditional collection of books and reference materials. The staff, library volunteers, and Friends of the Appleton Library organization are making every effort to continue the Library's tradition of excellence.

The needs of the Appleton community are changing, partly driven by technological developments, and the library has been and continues to adjust to the new needs.

As the Appleton community grows, the staff and volunteers want the library to grow accordingly as a source of education and enjoyment. Community support, both public and private, is required to ensure our Library meets the needs of our growing community.

We have one of the busiest libraries in Wisconsin by many measures. The terrific groups of people working and volunteering at the Library are diligently striving to maintain a top-quality and vibrant Library for the future.

John Larson
Robert W. Baird & Co.
Friends of APL Board

Engaged and Sustainable Organization

We maintain a knowledgeable and creative staff that represents and aids our diverse community. We work closely with many organizations and partners to benefit those we serve.

- We place a priority on recruiting, developing and investing in an engaged staff who reflect the personality and diversity of the community we serve.
- We maximize the potential of our community's public investment with private support and advocacy through Friends of Appleton Public Library and through recruitment of dedicated and engaged volunteers.
- We share resources and expertise with the library system in a mutually beneficial and integrated partnership.
- We develop cross-sector community partners in a manner that enhances library and partner resources.
- We provide a responsive, flexible, environmentally-friendly facility that can adapt to community priorities.

Enriched Entertainment

We embrace the important role of entertainment in the lives of our community members and its ability to enhance and enrich our lives. We maintain a collection that covers the breadth of changing interests, technologies and formats.

- We are a community-centered institution and strive to develop policies and services that respond to community needs and interests.
- We develop policies, collections and public services that include diverse representation from the community through the Library Board of Trustees, staff, volunteers, patrons and community-at-large.
- We play a key role in resource sharing within the library system and throughout the state.
- We serve as a place of discovery, inspiration, learning, discussion and gathering.
- We create a platform where librarians, community members and organizations can exchange knowledge on topics of interest to the community at large.
- We work with neighbors and the community as a whole to ensure that we offer a safe and welcoming environment.

Over many years of law practice, friends have asked me to talk to their children who seemed interested in becoming attorneys. I've often surprised them with the question "When you can steal away 10 minutes in a hectic day to do something strictly for pleasure, what do you do?" If they respond that they sneak in some reading, I tell them they might be OK going to law school and becoming a lawyer.

In my experience, the common denominator among successful, happy lawyers is that they love reading for pleasure and diversion…it helps keep them sane.

No matter one's walk of life, leisure reading can be a thing of daily joy. We need a thriving public library to make that joy available to all who desire it!

Jeff Riester
Godfrey Kahn
Local Reading Enthusiast

Jeff Riester

Kathy Flores

The Appleton Public Library is known as a welcoming and inclusive environment for our diverse community.

Their strategy of Specialized Services and Programs is an example of how they serve the needs of people from all different backgrounds in a compassionate, innovative and inclusive manner.

Working with individuals from varied backgrounds, APL continues to help people share their experiences and their stories with others to create opportunity for learning and real community interaction both inside the Library and in the community at large. APL staff understands that while diversity is something that happens naturally in a community, it is the action verb of inclusion that requires us to think outside the "box" or to even do away with the concept of the "box" altogether.

As the community continues to evolve and change in demographics, I am certain that the Appleton Public Library will keep up with those changes and continue to be seen as a leader in honoring diversity and inclusion.

The strategy of Specialized Services and Programs isn't just good business sense, it is imperative to the survival of community libraries.

Kathy Flores
City of Appleton
Diversity Coordinator

Specialized Services and Programs

We support and sustain learning for all ages. We address the varied needs within our community by offering targeted assistance for different populations.

- We provide specialized services and dedicated programs for diverse user groups.
- We provide resources to support a continual love of learning to patrons in all stages of life.
- We support adult education and learning.
- We work with individuals of all backgrounds and interests to create a forum where people can share their experiences and engage in community dialog.
- We participate in community-wide efforts to equalize opportunities for all ages and backgrounds.

Supporting Information

Community Conversations

What are your hopes and dreams for Appleton? This question is central to Appleton Public Library's future since our library is an important key to Appleton's future.

From March 2012 through April 2013, we created a community-driven planning process with community members sharing their hopes for Appleton's future and how APL might play a role. First we facilitated 10 public meetings in aldermanic districts, and every participant's voice was heard and recorded. Then we sought out 10 more special focus groups to ensure we heard all perspectives: teens, the millennial generation, moms, dads, entrepreneurs, creatives, diverse populations, business interests and those who weren't afraid to tell us the truth.

What we learned spanned these Conversations, and is reflected in this APL150 plan:

Appleton's Future

- Continue our strong local sense of community, caring, and quality of life
- Retain economic vitality while embracing change and diversity
- Sustain our essential institutions – for environmental and economic health

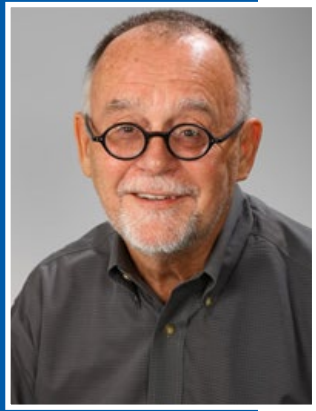
How APL can shape Appleton's hopes and dreams for future decades

- A "hub" for learning: engaging all ages and all demographics
- A facilitator for collaborations, shared community visions and important conversations
- A unique third place - which is not home or school or work, and a downtown anchor
- A place to embrace the opportunities of technology and creativity
- Adaptable flexible space which can be responsive to future needs
- A balance of Tradition and Innovation

We learned that our community members truly are the experts when it comes to our future.

Jan Quinlan
Friends of APL
Executive Director

Library Futures Series



Tony Nelessen
Urban Planner

Garry Golden
Futurist

In March and April of 2013, we brought in two guest speakers as part of our long-range planning process. The guest speakers, urban planner Tony Nelessen and futurist Garry Golden spoke about the future of libraries and how they can learn to anticipate changes in society and technology and how those changes will have an impact on our communities and civic institutions.

Nelessen has more than 37 years of professional experience as an urban designer, professor, author and practitioner in the fields of visioning, physical planning and urban design. His firm, A. Nelessen and Associates, is considered one of the foremost vision planning firms in the country. In his keynote, Revitalizing Cities and Towns in the 21st Century, Nelessen presented a fascinating look at the past, present and future.

Golden is an academically trained Futurist (MS Futures Studies) who speaks and consults on issues shaping society and business in the 21st century. Garry has consulted on a wide range of projects related to the future of infrastructure for energy and transportation, education/learning, emerging markets, civic and cultural institutions and the implications of demographic transitions. In his keynote, Tapping Your Inner Futurist: Foresight and Future of Appleton Public Library, Golden presented an understanding of how libraries can anticipate changes and how the changes can have an impact on our communities.

Both presentations may be viewed in their entirety by visiting our APL150 website at www.apl150.org.

Staff Experts Presentation

Over the Spring and Summer of 2013, Appleton Public Library staff members from the five main departments of the library worked hard to compile their knowledge and research regarding the future of library services.

The following pages summarize the future of each of the departments. The Staff Experts Presentation may be viewed in its entirety by visiting our long-range planning website at www.apl150.org. To view the presentation, click on the link, click on the full screen button in the lower right-hand corner of the presentation square and click the play button in the lower left-hand corner of the presentation square. The presentation includes voice-overs by staff members.

Children's Services

Imagine a library that provides an auditory, visual, tactile and kinesthetic experience for children to play, explore and direct their own learning experience. Imagine technology immersed in that environment so seamlessly that it becomes part of the physical experience. For example, imagine that children could walk on a large digital computer screen and take a virtual tour of the safari, stopping to see animals and touching the screen to hear animal sounds and to learn more about that animal.

Imagine too, that in this experience, children are directed to materials in our collections that they can check-out and take home to explore more about the safari.

Imagine a library that provides programs, community links, digital and physical space to meet the information needs of parents, as well as children, during these complicated stages of life.

Parents and children would come here to learn, create and share information. Parents and children would come here to discuss and solve community problems that involve childhood, parenting, family and more.

Imagine a library website that acts as a dashboard for parenting resources and family activities in our community and promotes everything local.

Imagine a library where we all gather to learn, create, share, solve problems, collaborate and make a collective impact in our local and global community.

Imagine…APL Children's Services.

Public Services

> **"The future belongs to those who believe in the beauty of their dreams."**
>
> ***Eleanor Roosevelt***

Before we look into the future, who is Public Services now? We are the in-house, front-line staff of the library. We help you find books, answer your questions, and assist you with any and all library services. Public Services as a section includes library assistants and clerks, but as a concept includes everyone from librarians to those who shelve books.

The future of Public Services is exciting and dynamic. Our future includes a shift in the questions asked and the technology and tools we use to answer these questions. Life-long learning opportunities and the chance to become their own creators will change how patrons utilize libraries in the future. Staff will find themselves in the role of teacher as they guide patrons in using new search tools, like discovery layers or scent-based search platforms, and new, ever changing technologies.

Community Partnerships

Since their inception, libraries have been in a state of constant evolution; clay tablets gave way to papyrus, papyrus to paper and paper to digital media. Today we might be seeing the greatest evolutionary shift yet and the jump to digital media is only a small part of the story. The meat of the story is the shift away from the quiet, almost sacred place where people come to consume information, to a community gathering place where information isn't the goal, but the catalyst for ideas to be exchanged and new content created. In short the focus is shifting off of the information and on to the community that can utilize it.

The future library will be a place where you can find information you need, when you need it; but it is only one of many tools. We will have the computers, software and other tools necessary for our community to realize their creative visions. We offer a gathering place where people have both the space and equipment needed to share ideas. The most important piece of the future library isn't a book or computer or any other tool, it's our community members. We have a community full of experts who can share their knowledge with other community members, with us acting to facilitate that information exchange. The community will be more active in helping guide us in making sure that we meet their needs. In short the future library will harness not just the knowledge trapped in our volumes but the knowledge of the entire community.

The best news of all is that you can see pieces of the future today at the Appleton Public Library.

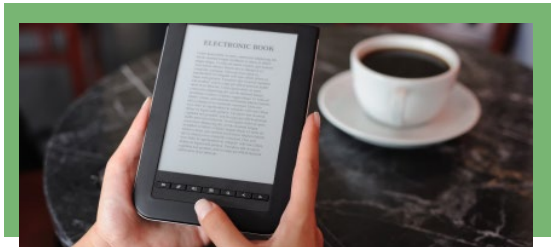
Continued on page 29

Materials Management

Libraries and publishing companies have always maintained a symbiotic and often tenuous relationship. U.S. libraries have long had the support of the law to provide loaning services without having to pay royalties on loan transactions. Once Congress passed the Digital Millennium Copyright Act (DMCA) in 1996, the legality of ownership of digital media, and what one could do with digital content drastically changed and the tenuous relationship between libraries and publishers would never be the same. DMCA identifies the sole ownership of digital products rests with the creator and it is against the law for anyone else to use those products without owner's permission.

It sounds simple, but the impact is huge! And not just for libraries, but for everyone and with just about everything; as even now our cars and refrigerators have computers and programs built into them.

Libraries have been warehouses of information for centuries. We spend a lot of time and energy organizing materials in order for users to be able to identify items that might be most useful to them. As long as the items are physical, we have the right to loan them to make patron's use of the information easy and more comfortable than having to spend days of reading over a table at the library.



One of the current challenges for libraries as we migrate from physical to digital, is to negotiate with publishers and build contracts that enable libraries to replicate the experience we've all become comfortable with; the borrowing or loan transaction. The ability to check out a digital product, use it, and then return it to the library's collection so someone else may use it. Also, libraries need to provide a consistent interface to find useful materials regardless where they are kept or hosted.

In a world of digital content where replication is easy to accomplish, what does a loan transaction mean? What does ownership mean? Do libraries need to have their own storage of digital content? Can this be provided through a publisher or third party? Will access come via a consistent interface like library catalogs? Ultimately, it all resolves down to how you will find materials useful.

Network Services

Our predictions for technology revolve around bandwidth, connectivity and the cloud, and the Internet of things: uniquely identifiable objects and their searchable/discoverable virtual representations.

> **Our world generates huge amounts of data daily.**

Our world generates huge amounts of data daily; structuring that data and coding a searchable platform could one day make the kinds of find-everything searches of TV and movies conceptually possible. This is the Internet of things, where much of life's data is uploaded, searchable, and linked to other data. That cloud of data will essentially become one machine that we all tap into with our devices. The web itself will become an operating system; all screens will look into it, and all bits will be stored in the cloud. Increasingly, people will relinquish their information in order to gain benefits. Formats will universalize increasingly, and media will become device-independent. Tapping in, we'll begin to understand that we are the other half of a completely co-dependent relationship with the machine. ■

S.W.O.T. Analysis

Appleton
Public Library

Appleton Public Library Strategic Planning Survey

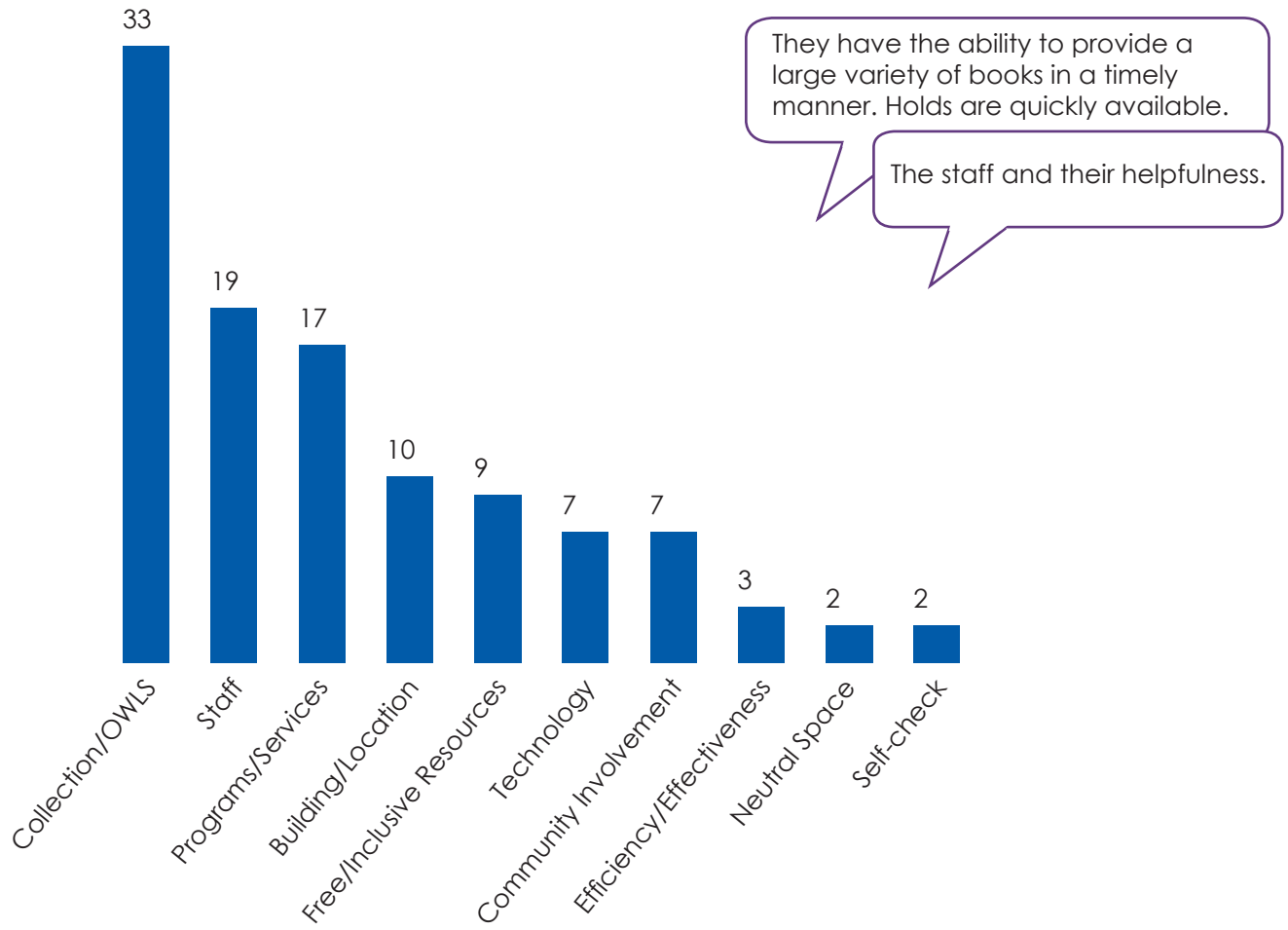
What do you see as the greatest strengths of Appleton Public Library?

Top Answers

1. Collection/OWLS
2. Staff
3. Programs/Services

Common Words

Variety
Central



They have the ability to provide a large variety of books in a timely manner. Holds are quickly available.

The staff and their helpfulness.

Appleton
Public Library

Appleton Public Library Strategic Planning Survey

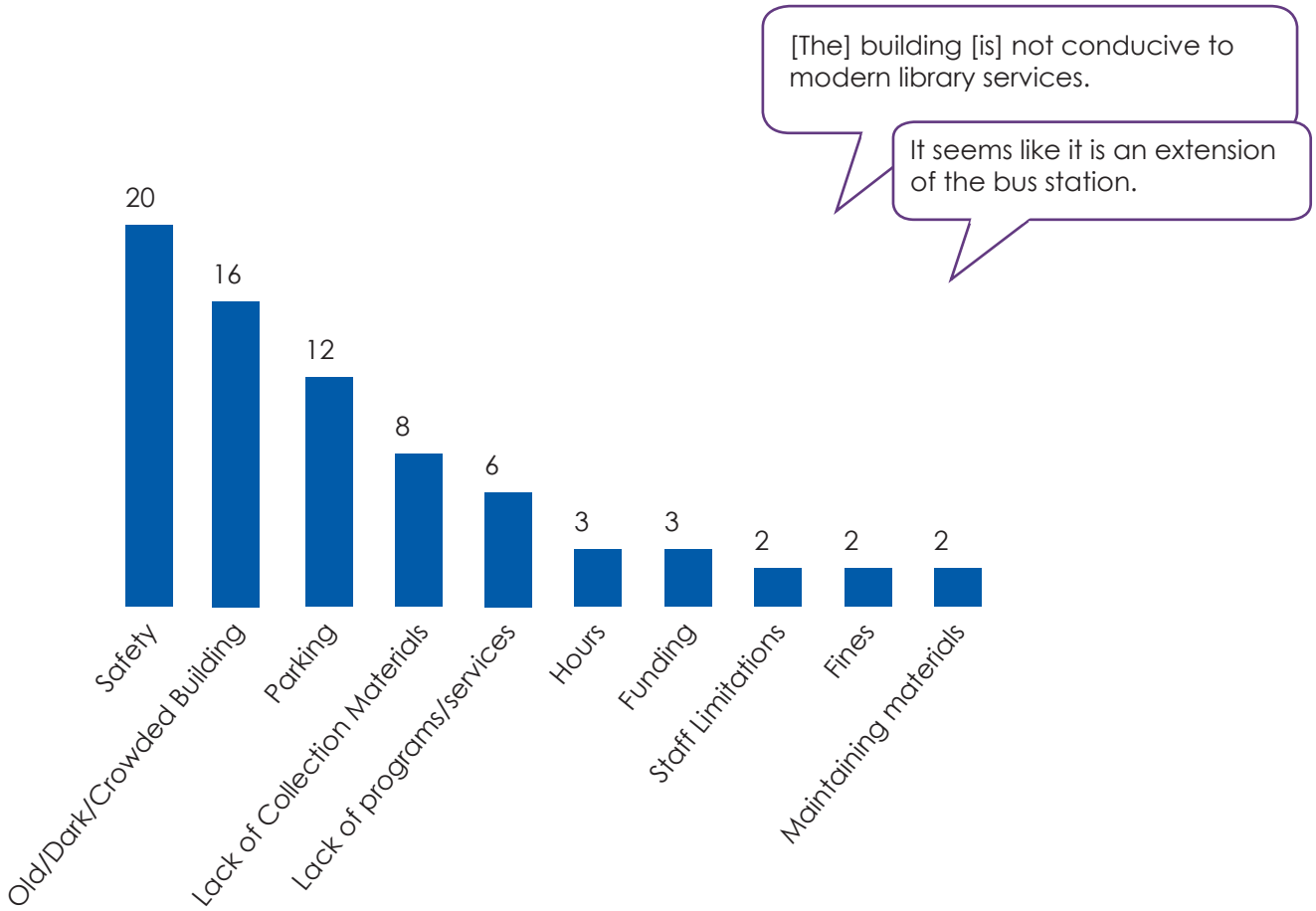
What do you see as the greatest weaknesses of Appleton Public Library?

Top Answers

1. Safety
2. Old Building
3. Parking Meters

Common Words

Parking
Security
Smoking
Entry



[The] building [is] not conducive to modern library services.

It seems like it is an extension of the bus station.

Appleton
Public Library

Appleton Public Library Strategic Planning Survey

What do you see as the greatest opportunities facing Appleton Public Library?

Top Answers

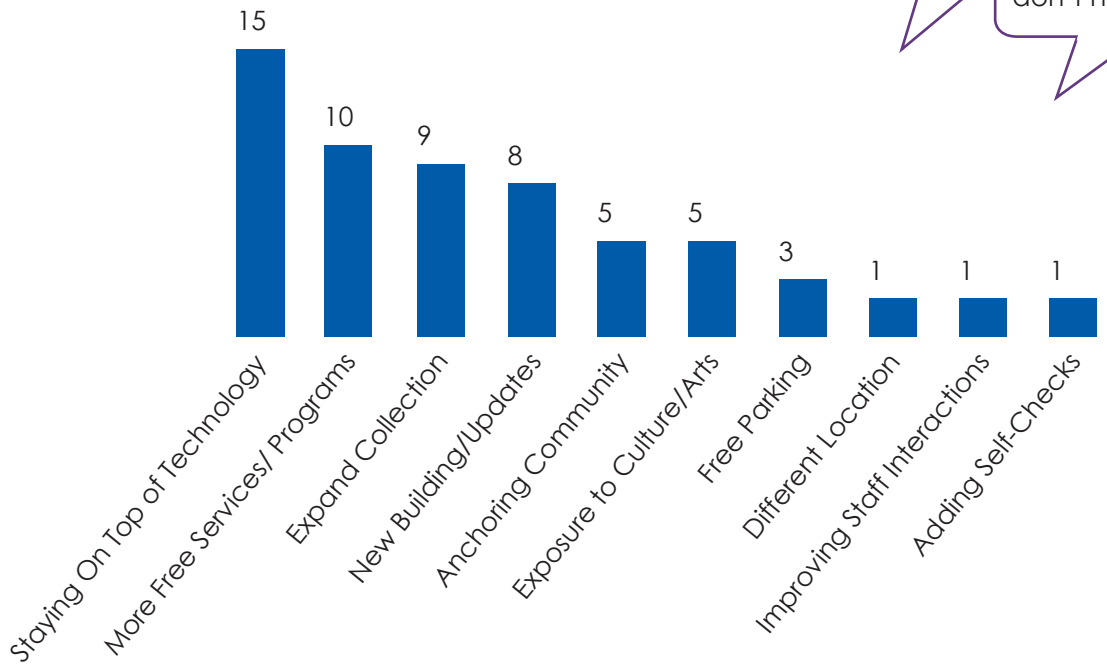
1. Technologically Relevant
2. Expanding Services
3. Expanding Collection

Common Words

Technology
Expansion

Moving forward and adapting to a quickly changing technological society while still making services relevant.

Expanding services to folks who don't normally go to the library.



Appleton
Public Library

Appleton Public Library Strategic Planning Survey

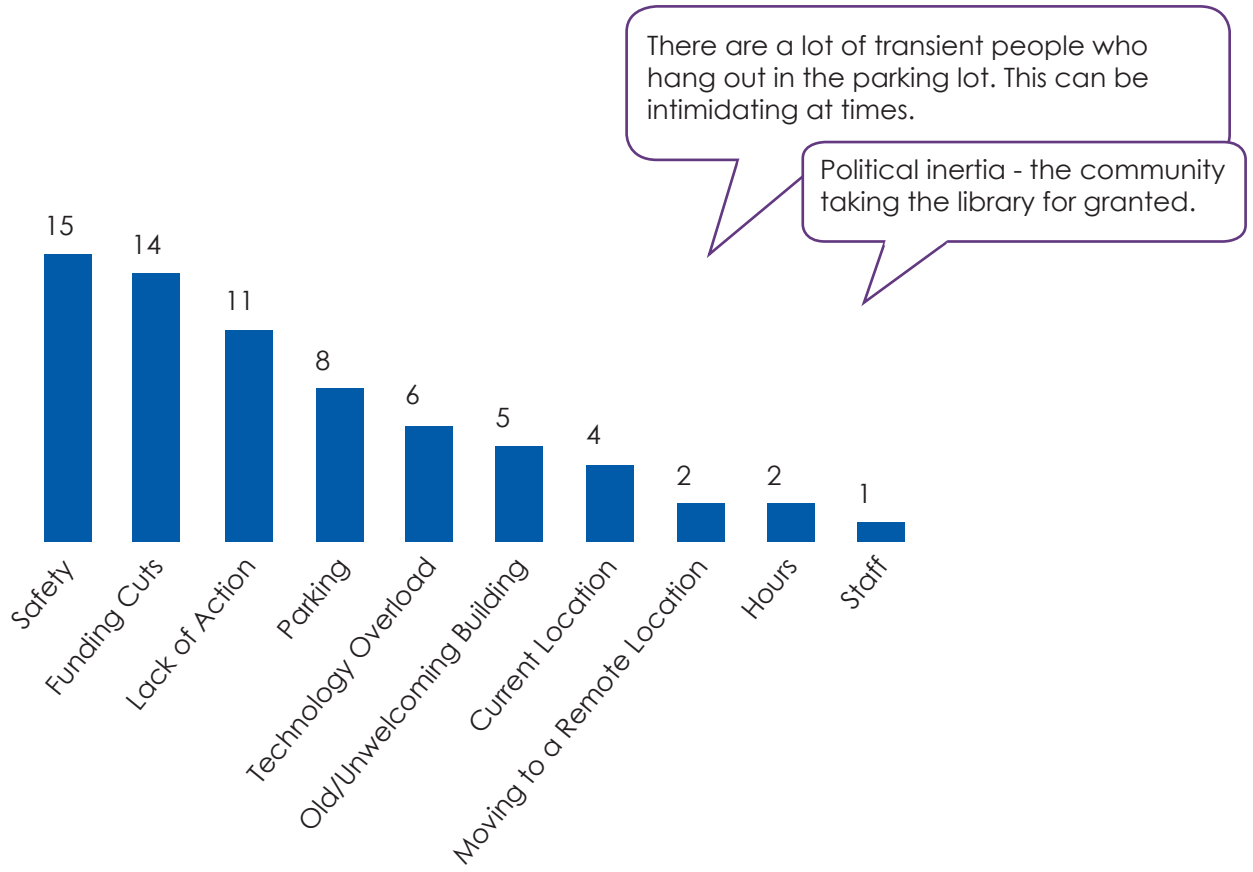
What do you see as the greatest threats facing Appleton Public Library?

Top Answers

1. Lack of Safety
2. Funding
3. Lack of Action

Common Words

Safety
Funding



CAC Meeting Minutes

Community Advisory Committee
Meeting Minutes
May 29, 2013

I. Introductions

Persons on the Appleton Public Library Community Advisory Committee (CAC) introduce themselves. City of Appleton Mayor Tim Hanna is introduced, as well as CAC facilitator Ben Fauske, Library Director Colleen Rortvedt and Friends of Appleton Public Library Executive Director Jan Quinlan.

II. Background

APL 150 Project Agenda: Ben reviews the agenda for May's CAC meeting, as well as the upcoming CAC meetings. The agenda includes:

Library Purpose (May 29, 2013)

a. Purpose of the sessions
b. Roles and Responsibilities
c. City of Appleton Vision and Mission Statement Review
d. Library History and Mission Statement Review
e. Service Leadership Overview
f. Library Core Competency
g. Exercise
h. Vision

Library Strategy (June 26, 2013)
Library Services (July 31, 2013)
Library Plan Review & Presentation (August 28, 2013)

City of Appleton Vision and Mission Statement Review: Mayor Hanna covers the current strategic plan of the City of Appleton, emphasizing the needs of the community and how city departments build strategies to guide priorities.

Introduction of APL 150: Library Director Colleen Rortvedt reviews what 21st century libraries are and introduces Appleton Public Library's long-range planning process - APL 150.

Community Conversations about the Library: Friends of Appleton Public Library Executive Director Jan Quinlan reviews the research that has taken place up until this point, including the Community Conversations about the Library initiative.

III. Discussion

Exercise One: Name one (or two) word(s) that describes your experience with libraries. Answers:

- Great People – positive experiences with staff

- Expression – a place to find yourself
- Access – access to everyone no matter what, a passport to opportunities
- Community – people gather as a community center, a lot of different opportunities are available
- Welcoming – see people from all walks of life, people trying new things
- Information – a place to discover new things, a great hub of information
- Collaborative Learning – a place to come and explore, come to surf the information – also hard to find space because it's so busy
- Gather – a place to gather, meet people, talk to people – a getaway place

Customer Service and Service Leadership Overview: Ben asks the group - how do we make the library a great experience? Positive customer experiences, as well as the ability for a company to engage with the customer are key to success. Zappos, Amazon and Apple are examples of leaders in customer service.

Exercise Two: Define the purpose of the library. Why does the library exist? Answers:

- Education - to prepare people for society and work
- Engagement – to prepare people to be active citizens
- Community – to serve the needs of the community, to improve the quality of life, the library is the reflection of the community
- Access – to provide free access to resources
- Anchor – to draw people to the community
- Equalizer – a place where everyone is treated equally
- Space – a place for neutral meeting grounds
- Growth & Discovery – a place for people to grow and discover

Exercise Three: What are the core competencies of the library? Answers:

- Free and accessible informational experiences
- To be a buffet of information
- Free meeting space (launch pad for entrepreneurial experiences)
- Providing space and information
- Showing how-to
- Accessibility – every person has the right to use the library
- The people in the building – the staff
- Providing green space

Exercise Four: Create a collage that describes the core competencies of the library. Words and photos used:

- Books x2 (photo)
- Bicycle (photo)
- Ways to change (words)
- Crafts (photo)
- Live your best (words)

- Coffee (photo)
- Musicians (photo)
- Diverse people x2 (words)
- Bus (photo)
- May we help you (words)
- Live your best life (words)
- Homemaker turn scientist (words)
- Affordable Family Fun (words)
- Turn information into intelligence (words)
- Compress knowledge (words)
- Get ideas off the ground (words)
- Brain (photo)
- Ideas (words)
- Treasures (words)
- Magnifying glass (photo)
- Place of fun (words)
- Sparking ideas (words)
- Quality matters (words)

Exercise Five: Come to a consensus about what the core competencies of the library are. Themes of core competencies:

- Information
- Inspiration
- Accessibility
- Opportunity
- Environment
- Facilities and People

Exercise Six: Share what you think is the legacy of the library. Answers:

- A depository of man and information
- An environment that is open to everyone
- A place that provides empowerment
- Having resources that people can access
- Having different spaces for different types of people
- A place where people can create information

Homework: The CAC was asked to come back to the next session, June 26, with one sentence stating the core competency of the library. The committee was also asked to watch the library futures videos featuring urban planner Tony Nelessen and futurist Garry Golden on www.apl150.org.

Community Advisory Committee
Meeting Minutes
June 26, 2013

I. Review

Facilitator Ben Fauske gave a brief review of the first Community Advisory Committee session. In the last meeting, the committee spent a majority of the time discussing the core competency of the library. Why does the library exist? Why is it unique?

APL 150 Project Agenda: Ben reviews the agenda for the June CAC meeting. The agenda includes:

Library Strategy (June 26, 2013)

a. Competency Review
b. Competency Rank
c. Vision
d. Strengths, Weaknesses, Opportunities and Threats
e. Brainstorm Future Services

Library Futures Videos: Colleen Rortvedt, Director of APL, plays two important clips from the Library Futures guest speakers who presented at the library in March and April. The CAC was asked to watch both videos before coming to this session.

The first clip, from urban planner Tony Nelessen, touches on the importance of the up-and-coming Millennial Generation. The second clip, from futurist Garry Golden, focuses of the shift of thinking about libraries in the traditional sense to what libraries are becoming – outputs vs. outcomes.

II. Discussion – Competency Review

Exercise One: What interesting things did you find out from watching the videos? What conclusions did you come to?

• It is important to talk about future generations. It is also important to talk about how we communicate.

• Able to better picture wow things are going to affect you in the near future. There are people who care about the future, people who look to the future – people from every generation.

• Library as a space is important. Also being a part of the millennial generation feels like a daunting task sometimes.

• Every generation seems to be grasping on to the transformation of cities. Millennials look for things to mesh together within the cities – looking for bigger cities that have all the amenities close by.

• The importance of community and connectiveness. It made me think of Minneapolis – the design lends itself to a sense of community. The library should be a center of all of that - the library being a sense of connection.

• The role of what libraries could become. How a library can be a key resource for that – pick and choose what fits your community.

Exercise Two: What was challenging about your assignment of coming up with a core competency of the library?

• You want to it be all things to all people. It was hard to nail down with one sentence.

• After meeting and thinking about everything, and watching the videos, I had come up with new ideas.

Exercise Three: Why is it important to find the core competency?

• It is what we are and what we do.

• It will help us focus on what to talk about next.

• It will help us identify what we are now so we can identify where we want to go.

• There may be confusion in the community if we don't have a solid competency.

• People have so many choices, if we're not aware of what we do best and communicate that, people won't think of us.

• If we don't have a solid message we lose hope of public/private funding. We're already working against public funding and there is a slim chance of moving forward if we can't convey a solid message.

• If you can't drive your ideas back to a mission statement, your organization's ideas get blurred.

• The community's doing so many different things. The City, Library and ADI are all trying to envision what the future is.

Review of core competency: Ben reviews what core competency means. The skills that sets your organization apart, makes you unique and the building blocks for the future. Examples of organizations that understand their core competency: Nike, Apple, Disney.

Exercise Four: Share your competency statement with a partner and why it matters to you. We will then share each competency with the group. Summaries of the core competencies by the Community Advisory Committee are:

• The Appleton Public Library provides a wealth of information, accessible to all, with staff willing to help if needed.

- A place for free and accessible information.

- Accessible knowledge, learning and information that inspires growth and change.

- Highly trained staff guiding you through the information maze, cultural experiences, literary experiences, putting together relevant programs. Appleton Public Library provides guided access free of charge and is a door of opportunity.

- Appleton Public Library improves the quality of life for all members of the community by delivering free access to programs and information.

- Appleton Public Library guides people to what they are looking for.

- Appleton Public Library is the community's primary resource.

- Appleton Public Library provides an environment of limitless knowledge and information.

- Appleton Public Library is a community gathering place and learning center.

Exercise Five: What would happen if Appleton Public Library no longer existed?

- The teenagers rely on APL because the school libraries aren't always available. It's a safe place to get away. It's my home away from home. Lose a very valuable resource.

- It might turn to private libraries. We'd be missing a place for people to be guided. People would be disconnected.

- It would affect the people who are life-long learners – a huge loss for those people.

Exercise Six: Who's the competition of the library?

- The Internet, tablets, computers
- Barnes and Noble
- Private businesses for programming
- Look at competitors as a quality of life (other communities), if you have a poor library system, people of different classes might not go there

III. Discussion – Competency Rank

Exercise 1: Pull out the important ideas from your original core competency sentence. Highlighted library core competency words from the CAC's sentences:

- Equal access
- Free
- Community gathering place
- Unlimited access

- Trained staff
- Willing to help
- Space beyond the physical building - virtual space
- Socially relevant programs
- Trustworthy
- Supports diversity
- Safety
- Learning
- Environment for thinking
- Tolerance and acceptance
- Unlimited quality information
- Community resource
- Inspiring growth and change
- Innovative technology
- Cultural experiences
- Literary experiences
- Meeting space
- Social space - 3rd space
- Safe place
- Refuge
- Non-judgmental
- Vibrant
- Building/being competent
- Belongs to the people

Exercise 2: What do you think is the future core competency of the library?

- Free
- Relevancy
- Connecting people with quality information
- Personal experience
- Environment for thinking
- Creative environment
- Connectedness
- Unbiased guided learning
- Virtual learning environments
- Space for thinking
- Innovation
- Knowledge
- Customer service
- Instruction
- Programs
- Aspiration
- Infinite possibility
- Empowerment
- Enlightenment

- Self-enrichment
- Resourcing endless opportunities
- Resourcing human potential
- Community collaboration
- Flexibility
- Expertise – knowledge and experience
- Expert guidance

Exercise 3: In groups, list the top three competencies of the library from the lists – for the future competency of the library.

- Responsive
- Resourceful
- Relevant
- Reliable
- Engaging physical and virtual space
- Equal Access
- Transforming human potential (enter good, leave better)
- Expert flexible knowledge
- Cultural, technological, literary, informational experiences
- Community connection

Exercise 4: Place a sticker by what you think is the library's top competency of the future.

- Transforming human potential (enter good, leave better) – **25 votes**
- Engaging physical and virtual space – **11 votes**
- Expert flexible knowledge – **11 votes**
- Cultural, technological, literary, informational experiences – **5 votes**
- Equal Access – **3 votes**
- Community connection – **3 votes**
- Relevant – **3 votes**
- Responsive – **2 votes**
- Resourceful – **2 votes**
- Reliable – **2 votes**

IV. Vision

Exercise 6: What is your vision for the future of Appleton Public Library? What would make the library better than it already is?

- Flexible meeting space that allows for large gathering areas and small meetings
- Co-working space with business center
- Green space (2)
- Interactive children's area
- Access to information with different forms of technology
- Brain space
- Innovative and creative space (2)
- Coffee shop (2)

- Safe, welcoming and inclusive
- Needs to be beautiful, green, and aesthetically pleasing
- No parking lot out front
- Having relationships with diverse community leaders – strategic relationships
- People should be able to see themselves in the library – ex. Spanish signs, transgender bathrooms
- Moveable walls/Flexible Space
- Digital lab
- A community auditorium/ stage space
- Important to stay on top of technology trends
- Social worker on staff/in house
- Professionals creating work
- Guided information – prescriptive services
- Providing a means for interaction
- Engaging experiences-virtual
- Connect to children's museum (other businesses/nonprofits)
- Collaborate with other libraries – "branch" libraries

Exercise Seven: What are the strengths, weaknesses, opportunities and threats dealing with the future core competency of the library?

Strengths:

- Community partnerships
- Efficient business operations
- Staff members
- Meeting spaces
- Location
- Legacy of being a public library
- Familiarity
- People expect a public library
- Free access
- Virtual presence
- Different forms of media

Weaknesses:

- Parking
- Building's inflexibility
- Unattractive building
- Institutional looking
- Can't tell it's a library
- No green space
- Negative perceptions
- Cannot keep money for fines
- Not enough meeting space
- Staff needs more diversity
- More staff

- Academic materials not as strong as media materials
- Hours
- Public meeting space not open after hours
- Needs more active space for kids

Opportunities:

- More public art
- Growing diversity of Appleton
- Public and private school system partnerships
- New space
- Improve on technology
- Alternative transportation options
- Grocery delivery service
- Partnership with private sector/business community
- More arts and music
- Engaging people virtually

Threats:

- Lack of funding
- Safety
- Social behaviors
- Search-engines
- General ignorance
- Cost of technology
- Cost of licensing
- People who think libraries aren't needed
- People resistant to change
- Political influence

V. Closing

Ben reviewed the public survey SWOT responses with the CAC. It was noted that there were a lot of similarities between the public surveys and the CAC SWOT brainstorming session.

Homework: The CAC was asked to watch the recently uploaded Staff Experts Presentation online before the July CAC meeting.

Community Advisory Committee
Meeting Minutes
July 31, 2013

I. Review

Facilitator Ben Fauske gave a brief review of the agenda for the July Community Advisory Committee (CAC) meeting.

APL 150 Project Agenda:
Library Services (July 31, 2013)

a. Core Competency Review
b. Vision Discussion
c. Services Review
d. Prioritization

II. Discussion – Homework Review: Staff Experts Presentations

Exercise One: What were the thoughts on the Staff Experts presentation?

- The "Discovery Layers" section was very interesting – really captures the library.
- The "One Machine" section was mind-blowing, very abstract and very intriguing.
- The "New Search Platforms" section was very interesting. The role of the library was made very clear through that section.
- Able to see that it's important to move toward being very flexible.

III. Review – Community Conversations Initiative

Colleen Rortvedt, Director, Appleton Public Library, reviews the common themes and the share priorities found in the Community Conversations Initiative.

Overall there were a total of 20 Community Conversations with over 140 participants, including 12 alderpersons and numerous community leaders. The first set of Community Conversations (April 2012) was set up as a town-hall meeting, where any one was invited to come and share their hopes and dreams about the future of Appleton. The second and third set of Community Conversations (October 2012, April 2013) was set up as focus groups where we were looking to converse with specific groups of people including: parents, teens, library "insiders", diverse populations, dads, entrepreneurs, millennials, artists, "candids" – those who spoke freely, and the business community.

Through this initiative, we were able to pick out the common themes and shared priorities for the future of Appleton from of all the groups. Those themes and priorities included:

Appleton Now:

- Appleton is a "Goldilocks" community – not too big, yet not too small
- There are a variety of experiences available to all
- A safe place to live and work
- A concern to maintain the healthcare and school system we have in place
- A progressive, yet conservative community

Appleton Future:

- Appleton needs to retain economic vitality while embracing change
- Continue with the current sense of community
- Sustainability – both economically and environmentally is important
- Maintain an effective government

Directives for APL:

- Be a community anchor and leader
- A hub for learning
- A facilitator for community
- Be flexible and adaptable
- Retain tradition while developing innovation

Similar results were found from the focus groups, but the focus groups tended to focus on specific issues including:

Diverse Populations:

- Safety
- Family-oriented community
- Generosity of the community

Millennials:

- The walkability of the city
- Seeing downtown as a place to live, not just visit
- Embracing the 21st century library
- Concern over the sprawl at the edge of town

Parents:

- Learning happens everywhere
- Creating welcoming spaces
- Services for children and families
- Continuing to serve those with limited resources
- Importance of central access

What did we learn from the Community Conversations initiative? We were able to pick out common threads and really come to an understanding of what the community's shared priorities were for the future of Appleton.

IV. Discussion – Core Competency of the Library & Strategic Pillars

Exercise Two: How do we feel about "Transforming human potential" as the library's core competency?

- The staff at APL feel like the wording is pretentious
- Like the idea of a community-based theme
- Like the tone of the word "expanding"
- "Transforming human potential" is too global
- Like the idea behind the competency, but we may need to dial down the tone
- Like "transforming" because it's an action word you can visualize
- "Transforming" creates a wow-factor
- "Transforming our community's potential together" seems less arrogant
- Like the idea of adding a personal tone to it – "APL and you: transforming community potential"

Exercise Three: What are the strategies APL needs to fulfill to make the vision, APL and you: transforming community potential, a reality?

- Provide guided access to technology
- Community educational outreach
- Strategic relationships
- Outstanding youth services – programs, music, video games, new readers
- Job placement services
- Creative/Maker spaces
- Flexible meeting room space
- Inviting to community to use
- A place for collaborative problem solving/sharing information
- Life-long learning
- Family programming – engage families
- Diversity, diverse people/languages/programs
- Remote access – webinars, services from home

- Communicate the success of the library
- Safe and welcoming environment
- Increase collaboration
- Increase numbers served
- Speak to individuals – skills, knowledge
- Increase social capital
- Aesthetically pleasing
- Public art
- Performance space
- After hours meeting space

Director Rortvedt also brainstormed strategies APL would need to fulfill to make the vision a reality. Her strategies were very similar to the CAC group, they include:

- Informed citizens
- Business/nonprofit support
- Diversity
- Internet connection
- Early literacy (birth-5)
- Family and local history
- Creation and sharing content
- Ready reference
- Connection and referral to community resources
- Adult literacy
- Teen literacy
- Family literacy
- Health literacy
- Life-long learning
- Career development

- Fun and recreation
- Support for schools/homework help
- Information fluency – finding, evaluating, using
- Safe welcoming space to gather
- Services for new immigrants
- Organizational sustainability –

    Financial – development plan (FRIENDS involved)

    Advocacy – community with community about 21st century libraries/listen to community about needs

    Marketing

- Children and Teens – the future

Exercise Four: What are the common themes of the strategies?

- Literacy
- Access to Technology
- Environment
- Community Collaboration
- Creation/Maker Space
- Life-long Learning
- Life Skills
- Diversity
- Fun and entertainment
- Youth Services

Exercise Five: Are there any of the common themes we can combine?

- Learning: Literacy, life skills, life-long learning
- Community Collaboration
- Technology
- Environment: Diversity, environment

- Fun and entertainment
- Talent: Friends, Staff, Volunteers
- Youth Services

V. Closing

Ben reviewed the final strategic pillars APL needs to fulfill to make the vision, APL and you: transforming community potential" a reality. Those strategic pillars, as brainstormed by the CAC, are:

- Learning
- Community Collaboration
- Technology
- Environment
- Fun and entertainment
- Talent
- Youth Services

Homework: Director Rortvedt was asked to review and add on to the seven strategic pillars that the CAC worked on. During the next CAC meeting the library will present a refined version of the seven strategic pillars.

Community Advisory Committee
Meeting Minutes
August 28, 2013

I. Review

Facilitator Ben Fauske gave a brief review of the agenda for the August Community Advisory Committee (CAC) meeting.

APL 150 Project Agenda:
Library Presentation (August 28, 2013)

a. Strategic Plan Review
b. Measurements
c. Communications Plan

Strategic Pillars

Colleen Rortvedt, Director, Appleton Public Library, reviews the feedback about the strategic pillars from the Appleton Public Library Board of Trustees, Appleton Public Library Staff, and Alderpersons.

• There were a lot of suggestions for the heading "Fun and Entertainment"

• There were questions about the current pillar order

• There was a question about what we mean when we say "community"

• We need to make sure we are attracting non-users

• When we talk about the plan, we need to make it clear that it is about services, not the physical building

II. Discussion – The vision statement

Ben Fauske, Facilitator, Appleton Public Library Strategic Planning Process, reviews the strategic planning document.

How do we feel about the vision statement – APL & you – transforming community potential? Do we want a vision statement that is a complete sentence?

The committee agrees that it should be in a sentence form and that it would resonate more with the community.

Exercise One: Work in partners to come up with a sentence for a full vision statement and explain your sentence when you present it to the group.

1. The Appleton Public Library is a space where the community's potential is transformed into reality.

- The wording allows it to be inclusive
- We didn't think "a space" made it sound important, so we said "the space"

2. Transforming potential for you and our community.

    - For people to be able to remember the statement it needed to be condensed
    - We were trying to get at the heart of the message
    - The "space" doesn't matter

3. The Appleton Public Library is the place where our possibilities become realities.

    - We didn't necessarily think "space" needed to be mentioned – but wanted the wording to still make the place feel special

4. Transforming potential into reality.

    - We were concerned with the word "space"
    - We thought keeping it short was the best way to go

Exercise Two: Let's talk about all of the statements you presented. What do you think about the statements?

- The current mission statement is very strong - "Transforming potential into reality" is a good statement to go along with it
- Reality can be a harsh word for some people
- We need to throw the word "space" in there – a physical space is very important
- We need to think 30 years out
- We need that human interaction element
- What about the word "realizing"
- "Translate" could be a replacement for "transforming"
- Suggestion: "Transforming potential with you and our community"
- Suggestion: "Potential transformed into reality"
- Like the idea of the library as an open door to really cool stuff – suggestion: "Create open doors where potential is transformed into reality"

After combining all of the suggestions the final vision statement became "Where potential is transformed into reality." The group likes the statement and thinks it flows well with the current mission statement.

The final vision statement is: "Where potential is transformed into reality".

III. Discussion – The strategic planning document

Director Rortvedt explains the strategic planning document the CAC gave her in the last session and the amendments she has since made to the document. Director Rortvedt breaks the discussion up into the six pillars she and her team worked on and asks for feedback from the Community Advisory Committee.

1. **Collaborative Environment**
   Director Rortvedt explains that this pillar combines several things from the list the CAC had given her at the end of July. This pillar addresses the quality of space as well as the community component.

2. **Hub of Learning and Literacy**
   This pillar is the core essence of the library. When putting the pillars in order of rank, this should be the first pillar and could serve as the visual hub or focal point.

   Suggestions and thoughts from the CAC:
   - Not sure about the word "hub"
   - Like the word "hub"
   - Is "hub" important?
   - Suggestion: "Channel of Learning and Literacy"
   - Is it hard to measure without the word "hub"?
   - What about technology in this pillar?
   - APL as a bridge to technology as a bullet point under this pillar

3. **The Future: Children and Teens**
   This pillar is based on how our departments are set up and specific developmental stages of these ages.

   Suggestions and thoughts from the CAC:
   - Concern with the words "The Future"
   - This is where we want to put our focus
   - Do we need a specific section for adults?
   - All of the other pillars speak to adults – need a special emphasis on these age groups
   - Need to mention programming for diverse groups, specialized services and programs
   - Should there be a seventh pillar – "Specialized Services and Programs" – it was agreed that there should be a seventh pillar and the CAC asked Director Rortvedt to develop that with her team.

4. **A Place for Creation and Innovation**
   This is the pillar that deals with the flexible space of the library.

   Suggestions and thoughts from the CAC:
   - Do we need "A Place For"?

5. **Engaged and Sustainable Organization**
   This pillar is the staff, volunteer and overall organization component of the plan.

   Suggestions and thoughts from the CAC:
   - Not sure about the word "Engaged"

6. **Fun and Entertainment**
   This is the tricky pillar when it comes to wording. The wording of this pillar is a potential problem.

   Suggestions and thoughts from the CAC:
   - Diversion and Recreation
   - Enlightenment and Fulfillment
   - When I hear recreation I think of being outside
   - Could Fun and Entertainment be placed under "Specialized services and programs?
   - Enjoyment and Entertainment

Exercise Three: Break into groups and brainstorm three words we could use to better explain "Fun and Entertainment".

- Diversion (2)
- Leisure (2)
- Enjoyment (2)
- Relaxation
- Recreation
- Thrills and Chills
- Fun and Games
- Leisure and Entertainment
- Enjoyable Experiences
- Recreation and Leisure

IV. Review – Measurements

How will our success of this plan be measured? Success will be measured by:
- Information produced
- Our staff serving patron needs
- Allowing for mobile services
- Reaching all different types of people
- Working together

V. Review – Communications Plan

Facilitator Fauske reviews what the final presentation will look like as well as a review of how we will communicate our new strategic plan:

• First the plan is presented to the APL Board of Trustees, Common Council and Staff. The greater community is then brought in to the plan

• We will be talking to small groups of people, as well as service groups

• To get the ball rolling, Director Rortvedt asks everyone in the CAC to find an organization that they are a part of where she can speak about the plan and process.

VI. Closing

Director Rortvedt and Facilitator Fauske thank everyone for their hard work and dedication to this process.

City of Appleton Strategic Plan

City of Appleton
Strategic Plan 2013-16 Update

Mission

The City of Appleton is dedicated to meeting the needs of our community and enhancing the quality of life.

Community Values

Quality Education

Recreational Opportunities

Safe, healthy, accepting environment

Welcoming and family-oriented

Strong and balanced economy

Vision

Appleton is a welcoming partner in a vibrant, diverse, well-planned, collaborative regional community that embraces neighborhood values.

Planning Assumptions

Workforce is changing (internal—retirements; external—competition for skilled and talented employees)

Increased utilization and dependency on technology

State and federal funding decline

Demographics of our community will continue to change.

Imbalance of service demands versus available resources.

Why and how people work will change.

Increasing demand for transparency and response.

Increased rate of change.

Key Strategies

1) Determine and communicate City priorities and allocate resources accordingly.
2) Proactively pursue collaboration and cooperative agreements to meet the needs of our community.
3) Embrace a culture of continuous improvement.
4) Attract and retain an inspired, engaged workforce.
5) Increase visibility, accessibility, transparency and marketing in communication.
6) Encourage sustainability.
7) Embrace diversity and inclusion within our organization.

Key Performance Measures

See each department's plan

Operational Plans:

See each department's plan

Wisconsin Public Library Standards

Wisconsin Public Library Standards and the Appleton Public Library
Data from 2012 State Annual Report

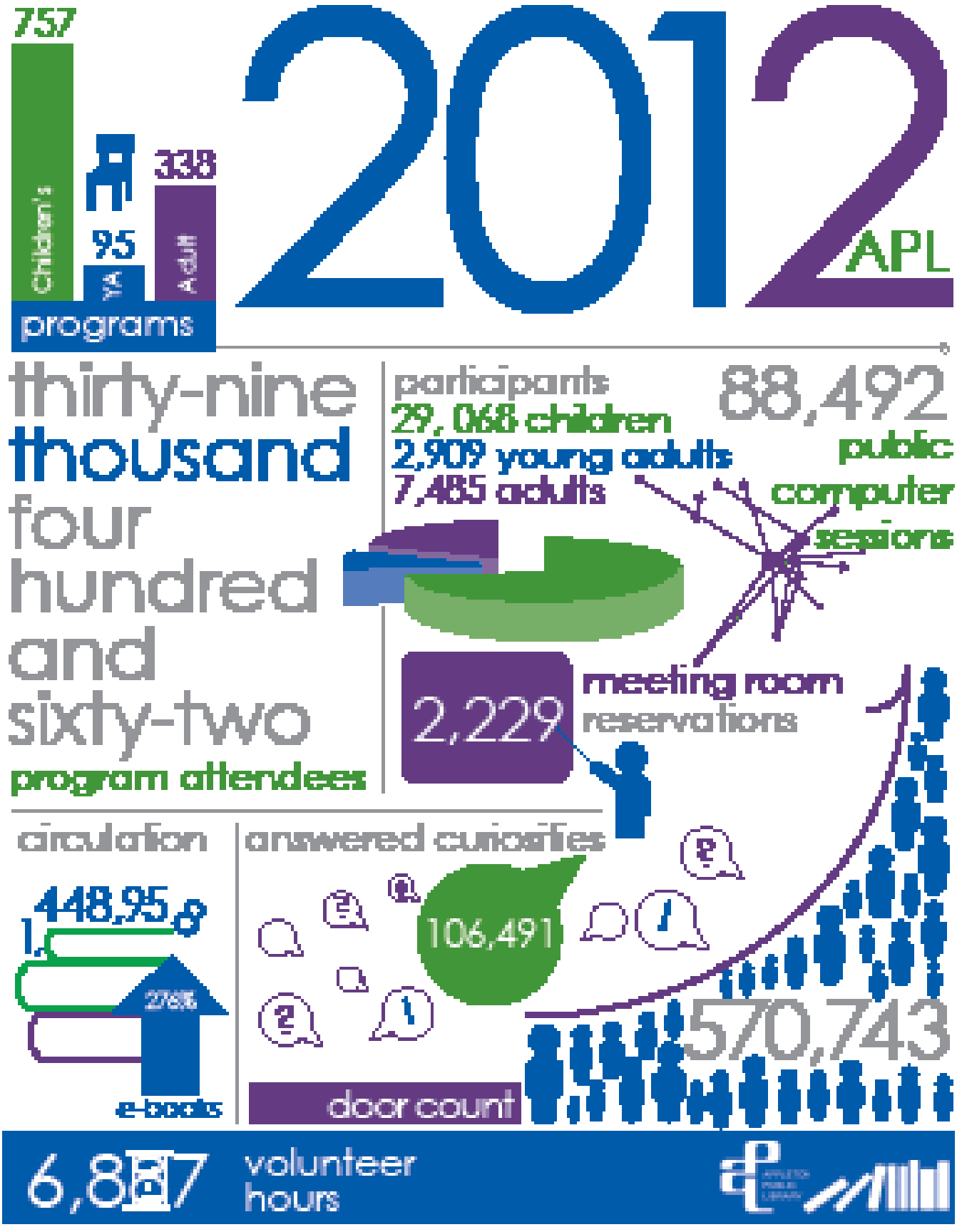
Designed to be used in planning processes, the standards look at libraries through two lenses: Service Population and Municipal Population.

The library can rank in four levels. The lowest is basic, then moderate, then enhanced, and the top is excellent. Below, you will see the various standards and how we rank in both service and municipal populations. As you can see, there are real differences between the service and municipal population figures.

STANDARD	SERVICE POPULATION	MUNICIPAL POPULATION
FTE Staff per 1,000 Population	**Moderate**	Enhanced/Excellent
Print Volumes per capita	Basic	Basic
Print Periodical Titles per capita	Basic	Basic
Audio Recordings per capita	Excellent	Excellent
Video Recordings per capita	Excellent	Excellent
Public Use Internet Computers per 1000 population	Basic	**Moderate**
Hours Open	**Enhanced**	Excellent
Materials Expenditures per capita	Excellent	Enhanced/Excellent
Collection Size per capita	Basic	**Enhanced**

Historic Statistics

2012 Statistics


2012 APL
757
Children's
95
YA
338
Adult
programs
thirty-nine thousand four hundred and sixty-two
program attendees
participants
29,068 children
2,909 young adults
7,485 adults
88,492
public computer sessions
2,229
meeting room reservations
circulation
448,958
276%
e-books
answered curiosities
106,491
door count
570,743
6,887
volunteer hours

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APL Board of Trustees

Terry Bergen
Terry Bergman
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John Peterson
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2018 Appleton Public Library Objectives

Hub of Learning and Literacy

Increase satisfaction with library online services from 82% somewhat satisfied or higher in 2017 to 90% by 2021 on the biennial patron survey.

Increase satisfaction with customer service from 92% somewhat satisfied or higher in 2017 to 95% by 2021 on the biennial patron survey.

Collaborative Environment

Increase satisfaction of public meeting room users on biennial patron survey from 53% somewhat satisfied or higher in 2017 to 65% by 2021.

The Future: Children and Teens

Maintain satisfaction with children's programs on the biennial patron survey at 2017 level of 95% or higher while increasing those who rate the programs at excellent or very good.

Increase satisfaction with teen programs back up to the 99% rate of good or higher that had been the standard for previous years by 2021.

Creation and Innovation

Increase satisfaction rates on the biennial patron survey with library technology offerings, including online services, public computers and the library website from 72% somewhat satisfied or higher in 2017 to 80% by 2021.

Engaged and Sustainable Organization

Increase safety satisfaction rate on the biennial patron survey from 69% somewhat satisfied or higher in 2017 to 80% by 2021.

Enriched Entertainment

Increase satisfaction with library materials from 90% somewhat satisfied or higher in 2017 to 95% by 2021.

Specialized Services and Programs

For adult programs, maintain satisfaction at 2017 level of 98% of good or higher on the biennial patron survey by 2021.

Amended 12/13/17

City of Appleton Strategic Plan

Mission

The City of Appleton is dedicated to meeting the needs of the community and enhancing the quality of life.

Vision

Appleton is the place
where people can use their talents to thrive.

Key Strategies

1) Promptly deliver excellent services.

2) Engage the community.

3) Recognize and grow everyone's talents. Recruit and retain an inspired and engaged workforce.

4) Continually assess trends affecting the community and proactively respond.

5) Promote an environment that celebrates inclusiveness characterized by diversity and respect.

6) Create opportunities and foster and environment that recognizes success and failure as a learning experience.

7) Communicate our success through stories and testimonials.