Worksheet for the Wisconsin Public Library Annual Report

Reporting Library Activities for 2023 (11/10/2023)

This worksheet can be used to compile necessary information before entering annual report data into LibPAS. All data entry fields are listed. Subtotal and total fields that are automatically calculated by LibPAS are not listed. Where infor­mation is provided by selecting a response from a dropdown list or radio buttons, the choices are shown, e.g. Yes / No.

*This worksheet does not replace the online annual report or the printed PDF report and cannot be accepted by the Department of Public Instruction (DPI).*

For additional information, see the [Instructions and Forms for the Public Library Annual Report page](https://dpi.wi.gov/libraries/public-libraries/data-reporting/annual-report).

# I. GENERAL INFORMATION

|  |  |  |
| --- | --- | --- |
| 1. Name of Library | |  |
| 2. Public Library System | |  |
| 3a. Salutation | |  |
| 3b. Head Librarian First Name | |  |
| 3c. Head Librarian Last Name | |  |
| 4a. Certification Grade | | Grade 1 / Grade 2 / Grade 3 / N/A |
| 4b. Certification Type | Regular / Temporary / Provisional / Vacant / Pending / Permanent | |
| 5. Certification Expiration Date | |  |

|  |  |  |
| --- | --- | --- |
|  | a. Street Address | b. Mailing Address |
| 6. Street Address |  |  |
| 7. City/Village/Town |  |  |
| 8. ZIP Code |  |  |
| 8 (part 2). ZIP+4 Code |  |  |

|  |  |
| --- | --- |
| 9. County |  |
| 10. Library Phone Number |  |
| 11. Fax Number |  |
| 12. Director's Library E-mail Address | @ |
| 13. Library Website URL http:// |  |
| 14. Number of Branches |  |
| 15. Number of Bookmobiles Owned |  |
| 16. Number of Other Public Service Outlets |  |
| 17. Does your library operate a Books-by-mail program? | Yes / No |
| 18. Is your library formally established as a Joint Library under Wis. Stat.43.53? | Yes / No |

|  |  |  |  |
| --- | --- | --- | --- |
| Hours of Operation | | | |
|  | Standard service with no restrictions on building access | Limited service | Staff only  (no interior service for the public) |
| 19a. Winter hours open per week |  |  |  |
| 19b. Number of Winter Weeks |  |  |  |
| 19c. Summer Hours open per week |  |  |  |
| 19d. Number of Summer Weeks |  |  |  |

|  |  |
| --- | --- |
| 20. Square Footage of Public Library (this location only) |  |
| 21a. Did your library or a branch move to a new facility during the fiscal year? | Yes / No |
| 21b. Did your library or a branch renovate or expand an existing facility during the fiscal year? | Yes / No |
| 22. UEI Number |  |

# Ib. OUTLET INFORMATION

Only libraries with branches or bookmobiles complete Section Ib. Complete a set of responses for each branch or bookmobile and the main library.

General Information

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Location | Legal Name of Branch | Mr/Ms | First Name of person in charge | Last Name of person in charge | Email for this location |
|  |  | Mr. / Ms. |  |  |  |

Address Information

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Location | Street Address | Mailing Address / P.O. Box | City/Village/Town | Zip Code | ZIP+4 | County |
|  |  |  |  |  |  |  |

Other Outlet Information

|  |  |  |
| --- | --- | --- |
| Location | Telephone Number | Square Footage |
|  |  |  |

Standard Hours of Operation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Location | Winter hours open per week | Number of Winter Weeks | Summer hours open per week | Number of Summer Weeks |
|  |  |  |  |  |

Limited Service Hours of Operation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Location | Limited Service - Winter hours open per week | Limited Service - Number of Winter Weeks | Limited Service - Summer hours open per week | Limited Service - Number of Summer Weeks |
|  |  |  |  |  |

Staff Only Hours of Operation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Location | Staff Only Service - Winter hours open per week | Staff Only Service - Number of Winter Weeks | Staff Only Service - Summer hours open per week | Staff Only Service - Number of Summer Weeks |
|  |  |  |  |  |

# II. LIBRARY COLLECTION

|  |  |
| --- | --- |
| 1a. Books in Print (end of year total) |  |
| 1b. Books in Print Added During Year |  |
| 2. Electronic Books (E-books) |  |
| 3a. Audio Materials (end-of-year total) |  |
| 3b. Audio Added During Year |  |
| 4. Electronic Audio Materials (downloadable) |  |
| 5a. Video Materials |  |
| 5b. Video Added During Year |  |
| 6. Electronic Video Materials (downloadable) |  |
| 7a. Other Materials Owned |  |
| 7b. Other Material Description |  |
| 8a. Electronic Collections (locally owned or leased) |  |
| 8b. Other Electronic Collections (purchased by library system or consortia) |  |
| 8c. Statewide Electronic Collections (provided through BadgerLink) |  |
| 10. Subscriptions (Includes periodicals and newspapers, but excludes those in electronic format) |  |

# III. LIBRARY SERVICES

1. Circulation Transactions

|  |  |
| --- | --- |
| a. Total Physical Circulation |  |
| b. Circulation of Children's Physical Materials |  |
| c. Circulation of Other Physical Items (subset of 1a) |  |

Interlibrary Loan (ILL) Transactions

|  |  |
| --- | --- |
| Method for Counting Interlibrary Loan (ILL) Transactions | Categorized ILL Transactions / Total ILL Transactions |

2 Categorized Interlibrary Loan (ILL) Transactions

|  |  |  |
| --- | --- | --- |
|  | Items Loaned to Other Libraries | Items Borrowed From Other Libraries |
| Integrated Library System (ILS) |  |  |
| WISCAT |  |  |
| Other (Includes OCLC, manual tracking, or other methods) |  |  |
| Totals |  |  |

2 Total Interlibrary Loan (ILL) Transactions

|  |  |
| --- | --- |
| a. Items Loaned (provided to) |  |
| b. Items Received (received from) |  |

3. Number of Registered Users *Revised 10/13/23*

|  |  |  |
| --- | --- | --- |
| a. Resident Users | ⬜ Not available |  |
| b. Nonresident Users | ⬜ Not available |  |
| d. Does the library charge overdue fines? | | Yes / No |
| This section contained definition changes in the September version workbook and instructions. These changes will not be implemented in the 2023 Annual Report. **Use the same method to count 3a and 3b as your library used for the 2022 Annual Report.** | | |

4. Reference Transactions

|  |  |  |
| --- | --- | --- |
| a. Method Used to Count Reference Transactions | Actual Count / Survey Weeks(s) / Did Not Collect | |
| b. Annual Count of Reference Transactions | |  |

5. Library Visits

|  |  |  |
| --- | --- | --- |
| a. Method Used to Count Library Visits | Actual Count / Survey Weeks(s) / Did Not Collect | |
| b. Annual Count of Library Visits | |  |

6. Public Computers

|  |  |  |
| --- | --- | --- |
| a. Number of Public Use Computers |  | |
| b. Number of Public Use Computers with Internet Access |  | |
| c. Method for Counting Uses of Public Internet Computers | Actual Count / Survey Weeks(s) / Did Not Collect | |
| d. Annual Count of Uses of Public Internet Computers | |  |

7. Uses of Public Wireless Internet

|  |  |  |
| --- | --- | --- |
| a. Method for Counting Uses of Public Wireless Internet | Actual Count / Survey Weeks(s) / Did Not Collect | |
| b. Annual Count of Uses of Public Wireless Internet | |  |

8.

|  |  |  |
| --- | --- | --- |
| Number of Website Visits | ⬜ Not available |  |

9. Electronic Collection Retrievals

|  |  |  |
| --- | --- | --- |
| a. Local Electronic Collection Retrievals | ⬜ Not available |  |
| b. Other Electronic Collection Retrievals | ⬜ Not available |  |
| c. Statewide Electronic Collection Retrievals | ⬜ Not available |  |

10. Uses of Electronic Materials by Users of Your Library

|  |  |  |
| --- | --- | --- |
| a. E-Books | ⬜ Not available |  |
| b. E-Audio | ⬜ Not available |  |
| c. E-Video | ⬜ Not available |  |
| e. Uses of Children’s Electronic Materials | |  |

11. Programming

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| In-Person Programs and Program Attendance Annual Count | | | | | | |
|  | 11a. Children (0-5) | | 11b. Children (6-11) | | 11c. Young Adult (12-18) | |
| Number of Programs | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
| Total Attendance | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
|  | 11d. Adult (19+) | | 11e. General Interest (all ages) | |  | |
| Number of Programs | ⬜ Not available |  | ⬜ Not available |  |
| Total Attendance | ⬜ Not available |  | ⬜ Not available |  |
|  | 11f. Onsite In-Person - Subtotal | | 11g. Offsite In-Person - Subtotal | | 11h. Total In-Person | |
| Number of Programs | ⬜ Not available |  | ⬜ Not available |  |  | |
| Total Attendance | ⬜ Not available |  | ⬜ Not available |  |  | |
| 11i. Describe the library's in-person programs: | | | | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Live Views of Virtual Programs and Virtual Program Attendance Annual Count | | | | | | |
|  | 12a. Children (0-5) | | 12b. Children (6-11) | | 12c. Young Adult (12-18) | |
| Number of Live Virtual Programs | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
| Total Live Virtual Attendance | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
| Total views of live programs that were recorded and posted for asynchronous viewing | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
|  | 12d. Adult (19+) | | 12e. General Interest (all ages) | | 12f. Total Virtual | |
| Number of Live Virtual Programs | ⬜ Not available |  | ⬜ Not available |  |  | |
| Total Live Virtual Attendance | ⬜ Not available |  | ⬜ Not available |  |  | |
| Total views of live programs that were recorded and posted for asynchronous viewing | ⬜ Not available |  | ⬜ Not available |  |  | |
| 12g. Which platforms does the library use to host the library's live, virtual programs: | | | | | | |
| 12h. Describe the library's live, virtual programs: | | | | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Views of Pre-recorded Programs and Pre-recorded Program Attendance Annual Count | | | | | | |
|  | 13a. Children (0-5) | | 13b. Children (6-11) | | 13c. Young Adult (12-18) | |
| Number of Pre-recorded Programs | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
| Total Pre-recorded Program Views | ⬜ Not available |  | ⬜ Not available |  | ⬜ Not available |  |
|  | 13d. Adult (19+) | | 13e. General Interest (all ages) | | 13f. Total Pre-recorded | |
| Number of Pre-recorded Programs | ⬜ Not available |  | ⬜ Not available |  |  | |
| Total Pre-recorded Program Views | ⬜ Not available |  | ⬜ Not available |  |  | |
| 13g. Which platforms does the library use to host the library's pre-recorded programs: | | | | | | |
| 13h. Describe the library's pre-recorded programs: | | | | | | |

Total synchronous program statistics [Calculated by LibPAS; this section is provided to cross check totals.]

|  |  |  |  |
| --- | --- | --- | --- |
| In-person Programs and Attendance + Live, Virtual Programs and Attendance (not asynchronous views) | | | |
|  | Children (0-5) | Children (6-11) | Young Adult (12-18) |
| Number of Programs |  |  |  |
| Total Attendance |  |  |  |
|  | Adult (19+) | General Interest (all ages) | Total Synchronous |
| Number of Programs |  |  |  |
| Total Attendance |  |  |  |

# IV. LIBRARY GOVERNANCE

Library Board Members

1. Library Board President

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Salutation | First Name | Last Name | Street Address | City | ZIP Code | Email Address |
| Mr. / Ms. |  |  |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Salutation | First Name | Last Name | Street Address | City | ZIP Code | Email Address |
| 2. Mr. / Ms. |  |  |  |  |  |  |
| 3. Mr. / Ms. |  |  |  |  |  |  |
| 4. Mr. / Ms. |  |  |  |  |  |  |
| 5. Mr. / Ms. |  |  |  |  |  |  |
| 6 Mr. / Ms. |  |  |  |  |  |  |
| 7. Mr. / Ms. |  |  |  |  |  |  |
| 8. Mr. / Ms. |  |  |  |  |  |  |
| 9. Mr. / Ms. |  |  |  |  |  |  |
| 10. Mr. / Ms. |  |  |  |  |  |  |
| 11. Mr. / Ms. |  |  |  |  |  |  |
| 12. Mr. / Ms. |  |  |  |  |  |  |
| 13. Mr. / Ms. |  |  |  |  |  |  |
| 14. Mr. / Ms. |  |  |  |  |  |  |
| 15. Mr. / Ms. |  |  |  |  |  |  |
| 16 Mr. / Ms. |  |  |  |  |  |  |
| 17. Mr. / Ms. |  |  |  |  |  |  |

|  |  |
| --- | --- |
| Number of Library Board Members |  |

# V. LIBRARY OPERATING REVENUE

1. Local Municipal Appropriations for Library Service

|  |  |  |
| --- | --- | --- |
| Municipality Type | Name | Amount |
| City / Town / Village / Tribe |  |  |
| City / Town / Village / Tribe |  |  |
| City / Town / Village / Tribe |  |  |
| City / Town / Village / Tribe |  |  |
| City / Town / Village / Tribe |  |  |
| City / Town / Village / Tribe |  |  |
| City / Town / Village / Tribe |  |  |

County

|  |  |
| --- | --- |
| 2a. Home County Appropriation for Library Service |  |

2b. Other County Payments for Library Service

|  |  |
| --- | --- |
| County Name | Amount |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

3. State Funds

a. Public Library System State Funds

|  |  |
| --- | --- |
| Description | Amount |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| b. Funds Carried Forward from Previous Year |  |

c. Other State Funded Program

|  |  |
| --- | --- |
| Description | Amount |
|  |  |

4. Federal Funds – Refer to Annual Report Instructions PDF for information on reporting E-Rate

|  |  |  |
| --- | --- | --- |
| Grant Number | Program or Project | Amount |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

5. Contract Income

|  |  |
| --- | --- |
| Name | Amount |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| 6. Funds Carried Forward |  |
| 7. All Other Operating Income |  |
| 9. Current Year Appropriation |  |
| 10. Exempt from County Library Tax [Wis. Stats. s.43.64 (2)]? | Yes / No |

# VI. LIBRARY OPERATING EXPENDITURES

|  |  |
| --- | --- |
| 1. Salaries and Wages |  |
| 2. Employee Benefits |  |

3. Library Collection Expenditures

|  |  |
| --- | --- |
| a. Print Materials |  |
| b. Electronic Materials |  |
| c. Audiovisual Materials |  |
| d. All Other Library Materials |  |

4. Fees and Contracts for Services from Other Libraries, Municipalities, and Systems *Revised 10/13/23*

|  |  |  |  |
| --- | --- | --- | --- |
| Service Provider Name | Description | Amount | Type |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |
|  |  |  | Fee / Contract |

|  |  |
| --- | --- |
| 5. Other Operating Expenditures |  |
| 7. Of the expenditures reported in [items 1-5], report the amount expended from federal program sources. |  |

# VII. LIBRARY CAPITAL REVENUE, EXPENDITURES, DEBT RETIREMENT, AND RENT

1. Capital Income & Expenditures

|  |  |  |  |
| --- | --- | --- | --- |
|  | Brief Description of Expenditure(s) | Revenue(s) | Expenditure(s) |
| a. Federal |  |  |  |
| b. State |  |  |  |
| c. Municipal |  |  |  |
| d. County |  |  |  |
| e. Other |  |  |  |

|  |  |
| --- | --- |
| 2. Debt Retirement |  |
| 3. Rent Paid to Municipality/County |  |

# VIII. OTHER FUNDS HELD BY THE LIBRARY BOARD

|  |  |  |
| --- | --- | --- |
| Beginning Balance of Other Funds Under Library Board Control | ⬜ No “other funds” |  |
| Additions | |  |
| Subtractions | |  |

# IX. TRUST FUNDS

|  |  |  |
| --- | --- | --- |
| Beginning Balance of Trust Funds Controlled by the Library Board | ⬜ No “Trust Funds” |  |
| Additions | |  |
| Subtractions | |  |

# X. STAFF (FTE)

1. Personnel Listing

a. Employees Holding the Title of Librarian

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Position (Local Title) | Job Title (Appendix A) | Type of Staff | Annual Salary | Hours Worked/Week |
| Director | Library Director / Chief Officer | MLS (ALA) / No MLS |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |

b. Other Paid Staff

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Position (Local Title) | Job Title (Appendix A) | Type of Staff | Total Annual Wages | Hours Worked/Week |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |
|  |  | MLS (ALA) / Librarian no-MLS / Other |  |  |

2. Library Staff Full-Time Equivalents (FTEs)

a. Persons Holding the Title of Librarian

|  |  |
| --- | --- |
| Master's Degree from an ALA Accredited Program |  |
| Other Persons Holding the Title of Librarian |  |

|  |  |
| --- | --- |
| b. All Other Paid Staff |  |

# XI. PUBLIC LIBRARY LOANS OF MATERIAL TO NONRESIDENTS

|  |  |
| --- | --- |
| 1. Of the total circulation reported for your library from Section III item 1, what was the total circulation to nonresidents. |  |

|  |  |  |
| --- | --- | --- |
|  | a. Those with a Library | b. Those without a Library |
| 2. Circulation to Nonresidents Living in Your County |  |  |
| 3. Circulation to Nonresidents Living in Another County in Your System |  |  |
| 4. Circulation to Nonresidents Living in an Adjacent County Not in Your System |  |  |

|  |  |
| --- | --- |
| 5. Circulation to All Other State Residents |  |
| 6. Circulation to Persons from Out of State |  |
| 7. Method for Determining Circulation Allocation | Actual / Survey |
| 8a. Access Denied under s.43.17(11)(b) ? | Yes / No |
| 8b. If Access Denied, Are Cards Sold? | Yes / No |

9. Circulation to Nonresidents

|  |  |
| --- | --- |
| Name of County | Circulation |
| a. |  |
| b. |  |
| c. |  |
| d. |  |
| e. |  |
| f. |  |
| g. |  |
| h. |  |
| i. |  |
| j. |  |

# XII. TECHNOLOGY *Revised 11/10/23*

Wireless Internet Access and Broadband

|  |  |
| --- | --- |
| 1. What is the speed of your connection to the internet? Choose the closest value. | 20MB / 50MB / 100MB / 200MB / 500MB / 1 GB / more than 1 GB |
| 2. At times of peak use, is the bandwidth of the library sufficient for patrons and staff? | Yes / No |
| 3a. How many hotspots does your library have in the collection for patron checkout? Do not include lost devices |  |
| 3b. How many internet-ready devices does your library have in the collection for patron checkout? Do not include lost devices. |  |
| 4. Does your library provide external wireless access on the library grounds or from a mobile unit such a bookmobile? | Yes / No |
| 5a. Does your library filter every library-owned computer for obscene content (including staff computers) **and** have a board-approved internet safety policy? If “yes,” you are [CIPA compliant](https://dpi.wi.gov/erate/cipa). | Yes / No |
| 5b. If your library answered no for 5a, provide a comment. |  |

Digital Literacy

The American Library Association defines “Digital Literacy” as: *The ability to use information and communication technologies to find, evaluate, create, and communicate information, requiring both cognitive and technical skills.*

|  |  |
| --- | --- |
| 6a. Does your library offer courses, training, or other kinds of assistance to support your patrons’ digital literacy? | Yes / No |
| 6b. If your library answered yes for 6a, provide a list of your offerings. |  |

# XIII. SELF-DIRECTED ACTIVITIES, STAFF SERVING YOUTH, AND STAFF SERVING ADULTS

1. Self-directed Activities

|  |  |  |  |
| --- | --- | --- | --- |
|  | 1a. Children (0-5) | 1b. Children (6-11) | 1c. Young Adult (12-18) |
| Number of Self-directed Activities |  |  |  |
| Total Self-directed Activity Participation |  |  |  |
|  | 1d. Adult (19+) | 1e. General Interest (all ages) | 1f. Total |
| Number of Self-directed Activities |  |  |  |
| Total Self-directed Activity Participation |  |  |  |

2. Staff Serving Youth

|  |  |  |
| --- | --- | --- |
| First Name | Last Name | Email Address |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

3. Staff Serving Adults

|  |  |  |
| --- | --- | --- |
| First Name | Last Name | Email Address |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# XIV. ASSURANCE OF COMPLIANCE (select Yes to indicate compliance)

|  |  |
| --- | --- |
| The library is established under s. 43.52 (municipalities), s. 43.53 (joint libraries), or s. 43.57 (consolidated county libraries and county library services) of the Wisconsin Statutes [s. 43.15(4)(c)1]. | Yes / No |
| The library is free for the use of the inhabitants of the municipality by which it is established and maintained [s. 43.52(2), 73 Op. Atty. Gen. 86(1984), and OAG 30-89]. | Yes / No |
| The library's board membership complies with statutory requirements regarding appointment, length of term, number of members and composition. [s. 43.54 (municipal and joint libraries), s. 43.57(4) & (5) (consolidated and country library services), and s. 43.60(3) (library extension and interchange)]. | Yes / No |
| The library board has exclusive control of the expenditure of all moneys collected, donated, or appropriated for the library fund [s. 43.58(1)]. | Yes / No |
| The library director is present in the library at least 10 hours a week while library is open to the public, less leave time [s. 43.15(4)(c)6] | Yes / No |
| The library board supervises the administration of the library, appoints the librarian, who appoints such other assistants and employees as the library board deems necessary, and prescribes their duties and compensation [s. 43.58(4)]. | Yes / No |
| The library is authorized by the municipal governing board to participate in your public library system [s. 43.15(4)(c)3]. | Yes / No |
| The library has entered into a written agreement with the public library system board to participate in the system and its activities, to participate in interlibrary loan of materials with other system libraries, and to provide, to any resident of the system area, the same library services, on the same terms, that are provided to the residents of the municipality or county that established the member library. This shall not prohibit a municipal, county, or joint public library from giving preference to its residents in library group programs held for children or adults if the library limits the number of persons who may participate in the group program, or from providing remote access to a library's online resources only to its residents. [s. 43.15(4)(c)4]. | Yes / No |
| The library's head librarian holds the appropriate grade level of public librarian certification from the Department of Public Instruction [s. 43.15(4)(c)6 and Administrative Code Rules PI 6.03]. | Yes / No |
| The library annually is open to the public an average of at least 20 hours each week except that for a library in existence on June 3, 2006, annually is open to the public an average of at least 20 hours or the number of hours each week that the library was open to the public in 2005, whichever is fewer [s. 43.15(4)(c)7]. | Yes / No |
| The library annually spends at least $2,500 on library materials. [s. 43.15(4)(c)8]. | Yes / No |

# Appendix A. Job Titles and Job Descriptions

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| **Category** | **Job Title** | **Alternate  Job Title** | **Job Description** |
| Human Resources & Finance | Accountant | Budget Specialist | Oversees clerical activities in connection with payables, debits, or credits. Prepares worksheets, analyzes to verify accuracy, prepares monthly journal entries, statements, monthly balance sheet, monthly statements, profit and loss, subsidiary, and other analyses and statements, following prescribed procedures. Qualifications generally include a bachelor’s degree in accounting or an associate degree with experience. |
| Library | Associate Librarian (non-MLS) |  | Provides specialized library services and programs, such as work in reference, youth services, teen services, or local history/special collections. Provide leadership and training on available resources to customers. Conducts outreach to promote library services. Selects and weeds materials. Serves as subject experts in area of work. |
| Human Resources & Finance | Bookkeeper |  | Performs diversified duties in maintaining accounting records. Verifies credits and deductions. Checks allocation of charges on bills payable. Maintains and balances petty cash account. Pays minor expenses, prepares daily cash balance figures, and weekly transaction reports. Checks employee expense accounts. Prepares monthly receipts and disbursement summaries, takes trial balances, locates discrepancies, and reconciles bank statements. Compiles special reports. Analyzes facts to determine the action to be taken, within the limits of standard practice. |
| Administration | Branch Manager |  | Manages an organizational unit of the main library or a branch that is physically separated from the main library. Plans and administers program of library services. Analyzes and coordinates departmental budget estimates and controls expenditures to administer approved budget. Reviews and evaluates orders for books and audiovisual materials. Examines trade publications and materials, interviews publishers' representatives, and consults with others to select materials. Administers personnel regulations, interviews and appoints job applicants, rates staff performance, and promotes and discharges employees. Plans and conducts staff meetings and participates in community and professional meetings to discuss and act on library problems. Delivers book reviews and lectures to publicize library activities and services. Provides library public relations services. May examine and select materials to be discarded, repaired, or replaced. |
| Maintenance | Building Maintenance Worker | Maintenance Person | Performs routine and preventive maintenance as directed. Performs various repairs requiring general knowledge of carpentry, plumbing, HVAC, and electrical and mechanical repair. Operates lawn-mowing and snow-blowing equipment. Arranges meeting rooms for special events. |
| Library | Cataloger |  | Performs original cataloging based on current standards, database maintenance, authority control, and provides training and inventory support for libraries. Resolves cataloging problems and aids in the maintenance of the online catalog. Typically has MLS and a higher level of duties than copy cataloger. |
| Human Resources & Finance | Clerk – Accounting (Payables) |  | Processes vendor invoices and matches with purchase order. Processes materials for public use, including labeling and data entry into the ILS if required. Performs routine duties requiring the use of a variety of forms, reports, or procedures. Performs miscellaneous duties such as filing, typing, sorting, or photocopying. |
| Library | Clerk – Public Services | Circulation Clerk, Desk Assistant, Desk Clerk, Bookmobile Clerk, Storyteller, Programmer, Trainer | Performs duties in Circulation, Interlibrary Loan or Reserve departments. Checks in and out materials; inspects materials for damage, verifies due dates; assists patrons with basic informational questions; sorts materials and prepares for reshelving. Provides basic patron assistance, locates materials, and provides information. Performs miscellaneous clerical duties such as filing, typing, sorting or photocopying. |
| Library | Clerk – Technical Services | Acquisitions Clerk, Government Documents Clerk, Processing Assistant | Acquires, organizes (bibliographic control), physically processes and maintains library collections. Provides assistance to patrons including topical research and material location. Assists patrons with the use of library resources and equipment. Screens the collection for outdated or unused materials following established guidelines. Provides basic patron assistance locates materials, and provides information. Maintains departmental or area records. Performs miscellaneous clerical duties such as filing, typing, sorting or photocopying. |
| Administration | Collection Development Specialist | Acquisitions Specialist | Analyzes community and library data to determine areas of the collection which need updating. Selects materials to update the collection. Performs related work as required. |
| Marketing & Public Relations | Community Outreach / Engagement Specialist |  | Works with external partners and identifies community needs related to library services and resources. Directs outreach activities. Builds partnerships and collaborations with diverse community organizations. |
| Information Technology | Computer Lab Assistant | Makerspace Assistant | Monitors the operation of adult and/or youth computer labs. Assists patrons with questions and problem resolution. Enforces computer lab rules. May assist with installation, operation, and- configuring of personal computer hardware and software. Investigates reoccurring problems and recommend a course of action to the supervisor. May perform backup operations and print reports. Help maintain day-to-day operations of the Library’s makerspace. |
| Library | Copy Cataloger | Cataloging Technician | Assist with maintenance of the library materials collection by withdrawal and relocation of library materials. Performs copy cataloging for print and non-print materials using OCLC, AACRII, MARC, DDC and local consortium standards. Serves as a resource for other library personnel concerning cataloging rules and practices. |
| Administration | Department Head / Coordinator / Senior Manager | Senior Librarian, Subject Specialist | Persons who supervise one or more professional librarians. Plans and administers the operation of library services. Coordinates activities of branch or departmental libraries. Develops goals and objectives, policies, procedures, and programs. Presents recommendations on library policies and services to governing body, such as Board of Directors or Board of Trustees, and implements policy decisions. Supervises staff participating in cataloging, classifying, and indexing library acquisitions and keeping records of items checked out. |
| Administration | Deputy / Associate / Assistant Library Director |  | Assists Director with planning and administrating programs and major aspects of the library operation (e.g., technical services, public services, collection development, systems/automation). Second in command with commensurate duties. |
| Administration | Development Manager | Donor Relations, Fundraising Coordinator | Manages and may participate in all aspects of library’s annual fund development program. Identifies potential donors and maintains donor database. Responsible for maintaining budgets of delegated programs and may supervise staff. |
| Other | Driver (Bookmobilie) | Bookmobile Operator | Driver loads and unloads materials. Drives to and from specified locations. Assists patrons with material selection. Checks in and out materials. |
| Other | Driver (Delivery) | Delivery Van Driver | Drives a library vehicle to pick-up and deliver library material between libraries, systems and branches. Determines sequence of loading for delivery purposes. Performs basic maintenance on vehicle. Informs supervisor when additional vehicle maintenance is necessary. |
| Library | Electronic Collections Technician / Developer |  | Coordinates electronic materials loaned through various databases or electronic collections for patrons. |
| Administration | Executive Assistant |  | Performs Administrative Assistant duties for the chief executive official in the organization. Processes information of a highly confidential and important nature. Composes correspondence, notices, memos, etc. Organizes and maintains confidential personal files and records. Manages the chief executive's calendar. May independently compile and prepare special reports, selecting congruent data from various sources. Duties require an extensive knowledge of the organization's functional areas and their interdependencies with outside agencies and officials and an excellent working knowledge of organizational policies/procedures. Position typically staffed by individuals with advanced secretarial training, considerable work experience, and broad knowledge of organizational policies. |
| Maintenance | Facility Engineering Manager (Maintenance) |  | Responsible for grounds, buildings and building equipment. Supervises the installation, maintenance and repair of electrical, gas, air, and water installations; fire sprinklers; the operation of building equipment and facilities; janitorial services; and the maintenance of grounds. Works with outside contractors and architects on building construction as necessary. Plans, lays out and assigns work, involving diagnosing and remedying difficult problems. Reports defective equipment and recommends the replacement of obsolete or damaged equipment when estimates of repair costs are excessive. Expedites building repairs in construction to avoid production delays. Performs normal supervisory functions in a department with seldom more than 10 persons. |
| Human Resources & Finance | Grant Proposal Writer |  | Researches and investigates grant opportunities. Prepares grant proposals in accordance with funder’s giving policies, guidelines and criteria. |
| Marketing & Public Relations | Graphic Artist/Designer |  | Designs unique, original materials based on aesthetic trends. Plans layout and creates materials such as brochures, manuals, advertisements, reports, newsletters and forms using a variety of desktop publishing software. Researches and recommends the purchase of related software and hardware. Organizes and implements desktop publishing and operating methods and procedures. |
| Human Resources & Finance | Human Resources Assistant |  | Organizes and maintains records, and files government reports as scheduled. Maintains employment statistical data and prepares related reports. Assists in employment activities involving interviewing, verifying qualifications, and checking references. Assists in administering employee benefit programs. Responds to employee inquiries on matters related to library programs and activities. |
| Human Resources & Finance | Human Resources Manager |  | General responsibility for all personnel activities, such as employment, training, wage and salary administration, safety and working conditions, employee counseling, and personnel records. Investigates, advises, and prepares policies affecting personnel, and consults and advises on interpretation and administration. Conducts union contract negotiations as required. Advises management on interpretation of policy. |
| Information Technology | Information Technology Manager | Technical Services Lead Worker or Supervisor | Manages day-to-day IT operations including systems analysis, programming, and computer and auxiliary operations. Directs the development and maintenance of systems. Determines and recommends department budgets and analyzes controllable expenditures. May plan and coordinate the evaluation and effectiveness of existing data processing applications and the feasibility and potential value of new applications. May assist staff and patrons with troubleshooting equipment or software problems. |
| Library | Inter-Library Loan Assistant |  | Coordinates materials loaned through the inter-library loan system for patrons, other libraries and institutions. Searches databases and the Internet for inter-library loan requests utilizing ISBN, ISSN and citation numbers. Determines best sources for materials. |
| Maintenance | Janitorial Cleaner | Cleaning Person, Housekeeper, Custodian, Janitor | Cleans assigned areas using power equipment as needed. Cleans drinking fountains, offices partition windows and lavatories. Replenishes supplies. |
| Library | Librarian (MLS) |  | Provides specialized library services and programs, such as work in reference, youth services, teen services, or local history/special collections. Provide leadership and training on available resources to customers. Conducts outreach to promote library services. Selects and weeds materials. Serves as subject experts in area of work. Requires a Masters Degree in Library Science from an American Library Association (ALA) accredited institution. |
| Library | Library Assistant – Public Services | Library Associate, Technical Assistant-Public Services | Performs entry-level professional library work by applying the full scope of basic library knowledge and techniques in the performance of duties. Answers reference questions and performs readers advisory services. Reviews assigned media and selects books and other library materials for purchase on the basis of selection criteria. Verifies book orders for bibliographic data to ensure proper ordering. Typically requires a Bachelors Degree. |
| Library | Library Assistant – Technical Services | Library Associate, Assistant-Technical Services | Acquires, organizes (bibliographic control), physically processes and maintains library collections. Provides assistance to patrons including topical research and material location. Assists patrons with the use of library resources and equipment. Screens the collection for outdated or unused materials following established guidelines. May perform managerial and administrative duties. |
| Administration | Library Director / Chief Officer |  | Chief officer of the library. Submits recommendations on library policies and service to governing body and implements policy decisions. Analyzes, selects and executes recommendations of personnel, such as division directors or branch supervisors. Coordinates activities of branch or division libraries. Analyzes and coordinates departmental budget estimates and controls expenditures. Administers personnel regulations, interviews and appoints job applicants, rates staff performance, and promotes and disciplines staff. |
| Library | Manager/Supervisor of Support Staff | Circulation Lead Worker or Supervisor | Persons who supervise support staff in any part of the library but do not supervise professional librarians. |
| Marketing & Public Relations | Marketing Specialist | Marketing Coordinator, Social Media Coordinator | Oversees the creation, implementation, and execution of a library marketing plan. Coordinates marketing efforts, planning, creating, and directing print and electronic marketing strategies for all ages. |
| Human Resources & Finance | Office Manager | Business Manager | Assumes direct responsibility for filing, mail, communications, and printing departments. Implements and follows through on general office policies. Confers with other departments regarding the purchasing of office equipment, systems, and procedures affecting more than one department, and the hiring and transferring of employees and office salary structure. Prepares payroll tax returns and performs payroll accounting for the organization as required. Maintains retention schedule for library records. |
| Administration | Office Support (Entry) | Clerk Typist, Office Assistant | This is an entry-level clerical position performing various routine secretarial and clerical duties, including typing letters, reports, and other correspondence. May perform other clerical duties such as filing, mail distribution, and answering telephones. May be in receipt of fees and other monies. |
| Administration | Office Support (Intermediate) |  | Under moderate supervision, performs more complex or diverse clerical duties for one or more staff. Typical functions include word-processing, typing, managing appointments, screening mail, and handling special projects as required by the supervisor. May prepare reports with minimal supervision. Position typically requires a higher-level proficiency in office software and several years of experience. |
| Administration | Office Support (Top) | Office Supervisor | Provides advanced level clerical and administrative support to a major administrative program or function within a department that requires the exercise of an advanced level of technical expertise and job knowledge. May coordinate services such as personnel record keeping, budget coordination, housekeeping and inventory, records management, and office systems improvements. May coordinate collection and preparation of operating reports, including preparing preliminary conclusions. May interview job applicants, orient new employees, or plan training programs. |
| Library | Page/Shelver | Library Page, Materials Shelver | Moves and unloads carts. Shelves materials in appropriate locations. Shelf-reads assigned areas and straightens collection as needed. Removes out-of-place materials for reshelving. |
| Human Resources & Finance | Payroll Technician |  | Under direction of person responsible for the payroll; prepares and records payroll data from timesheets and other records. Verifies payroll information and reconciles errors. Processes payroll deductions and changes. Generates payroll reports, checks, W-2's, etc. Answers employee questions regarding individual paychecks. |
| Marketing & Public Relations | Public Relations Officer | Public Information Coordinator, Public Relations Person | Promotes and administers public relations policies and programs such as special events, news articles, and audio and visual communication media. Maintains relations with newspaper, radio and TV media, community groups and agencies, school districts and the Board of Trustees. |
| Other | Security (Discipline Monitor) | Security Guard, Library Monitor, Security Officer, Watchguard | Makes regular watch rounds of premises outside of scheduled working hours, where frequency of trips and stations is prescribed. Checks buildings, equipment and materials for leaks, fires, unauthorized individuals and other conditions. Ensures that all entrances and windows are secured, and that elevator and fire doors are closed. Makes written report of all irregularities or unusual circumstances. |
| Library | Social Worker | Inclusive Services Coordinator | Responsible for assessment and management of individuals with an emphasis on psychosocial wellness, medication assessment and assistance, care plan creation, health coaching as appropriate. Responsible for interacting and guiding individuals, their families and/or supportive partners to better understand, navigate, and access community services. Develops and maintains close working relationships with community organizations, health providers and treatment centers. This is an expert level social worker classification and License is required. |
| Information Technology | Technical Support/Computer Technician |  | Installs, maintains, repairs computers, peripheral devices, and software. May conduct training. Troubleshoots and resolves problems associated with local and wide area network environments. Has responsibilities for dealing with hardware and software vendors and technical support issues. Troubleshoots PC software, coordinates with help desk and sets connections to broadband/baseband networks. May conduct training. |
| Information Technology | Web Content Administrator |  | Develops, provides, and authorizes website content to increase track, support and promote services, and gain content visibility. Manages and performs website editorial activities including gathering and researching information that enhances the value of the site. May oversee data control technicians and writers dedicated to website. |
| Other | Volunteer Coordinator | Friends' Shop Manager | Coordinates all volunteers and volunteer programs. Assesses volunteer needs. Recruits, screens, and places volunteers. Works with staff ensure proper orientation given and evaluates performance. May develop and coordinate volunteer recognition programs. |