

## State superintendent approves 2008 LSTA grant awards

By **Mike Cross**, Director  
Public Library Development Team

State Superintendent Elizabeth Burmaster has approved Library Services and Technology Act (LSTA) program grants totaling \$3 million for 2008. The Wisconsin LSTA Advisory Committee met in Madison November 14-15, 2007, to review the grant applications and make recommendations to the state superintendent on grant awards. Grant award letters were sent out in late December.

### Summary of Selected Proposed LSTA Grant Programs

*Wireless Connections* – \$56,335 has been awarded to assist public libraries in installing the technology needed to offer wireless Internet access for library patrons or to upgrade current wireless service. Grant funds are allocated based on a maximum of \$500 per participating library.

*Innovative Uses of Technology* – \$55,603 has been awarded to assist public libraries and public library systems in implementing programs or services that demonstrate innovative uses of technology in the library.

*Library Development Training* – \$18,560 has been awarded to hire trainers to provide expertise to public library staff and boards to learn more about library related topics and issues and enhance the ability of the library staff to better serve patrons.

*Adolescent Literacy Initiative* – \$20,000 has been made available to fund a statewide leadership conference and regional training on the literacy needs of adolescents, adolescent brain development, and the role public libraries play in promoting adolescent literacy.

*Statewide Library Strategic Planning Summit* – \$30,000 has been set aside to support a statewide library visioning/strategic planning summit in May 2008. Planning for this conference is underway.

*Shared Systems for Schools* – \$31,180 will fund a demonstration project allowing two public school districts to develop an integrated shared system under the leadership of CESA 10. This project would provide other districts the opportunity to evaluate the concept of an integrated shared library system supported and facilitated by CESA 10 and to join as local or grant funding allows.

*Library System Technology Projects* – \$400,000 has been awarded to systems on a formula basis for technology projects based on the needs of the systems and member libraries. The formula takes into account system area and population.

*Virtual Reference* – \$69,300 has been made available for the third year of a statewide contract for virtual reference services available to Wisconsin residents 24/7. Supplemental funds are provided by participating libraries and systems. During 2008 the virtual reference service will be evaluated and a long-term funding model developed.

Please see *LSTA 2008* — on page 3

### In this issue

State superintendent approves 2008 LSTA grant awards .....	1
COLAND, DPI plan library strategic visioning summit .....	2
Library systems to share \$16.1 million in state aid ..	4
Reference and Loan develops BadgerLink Toolkit .....	5
Terrie Howe is new LSTA Coordinator and Continuing Education Consultant for DPI .....	5
Governor Doyle signs Senate Bill 214, applies to disclosure of library video surveillance recordings ..	6
What's new at RLL, Part 2 .....	6
DPI named 'Thinkfinity Rollout Partner' for Wisconsin .....	7
Trustee Corner .....	8
Best Practices for Public Libraries .....	10
Changes to Common School Fund now in effect ..	11

## COLAND, DPI plan library Strategic Visioning Summit

By **Kathy Pletcher**, Chair  
Council on Library and Network Development

What will the library of the future look like? How will it contribute to the quality of life in our communities? What role will the library of the future play in the educational and economic development of the state? Will libraries still be a major player in the preservation of Wisconsin heritage and culture?

The Council on Library and Network (COLAND) and the Wisconsin Department of Public Instruction (DPI) seeks answers to these and other questions in preparation for a Strategic Visioning Summit on the Future of the Library. You can participate by going to the COLAND web site at <http://dpi.wi.gov/coland/vision.html> and entering your personal responses to any or all of the seven questions. Your ideas will be considered by the Summit Executive Planning Committee as they design Summit activities.

The Summit will be an invitational event attended by 100 key library leaders and library advocates from across Wisconsin. Its purpose is to develop a vision for how libraries of all types will contribute to the continued prosperity of Wisconsin and its communities by promoting quality of life, health of our democracy, educational excellence, economic and workforce development, and the preservation of our heritage and culture. In developing the vision for libraries, Summit participants will take into consideration State Superintendent Elizabeth Burmaster's 21st century education initiatives as well as Governor Doyle's economic plan, *Grow Wisconsin*. Summit participants

will develop recommendations for the Superintendent that can be included in future planning and budget initiatives.

An Executive Planning Group was appointed to develop the Summit agenda and select participants. Applications and nominations for the Summit were accepted through December 7, 2007, and the Executive Planning Group met the following week to select individuals to invite to the Summit. In selecting participants, the planning group considered the following criteria: 1) Diversity: people representing different age groups, different user populations, and a variety of ethnic and cultural backgrounds; 2) Geography: people from all areas of the State; 3) Library type: small and large libraries, urban and rural libraries, and different types of libraries (public, academic, school, special); 4) Roles: trustees and other library supporters, as well as librarians who directly serve the public; 5) Library educators; 6) Non-librarians: political representatives, municipal and county officials who fund libraries, school superintendents, technology coordinators, instructors; and, 7) Library patrons.

Invitations for the Summit, which will take place May 5-6, 2008, at the Heidel House Resort in Green Lake, Wisconsin, will be sent out in January. Participants are expected to commit to attend the full two days.

Members of the Executive Planning Group are Kathy Pletcher, COLAND Chair; Rick Grobschmidt, DPI; Jim Backus, trustee, Wisconsin Valley Library Service (representing Wisconsin

Library Trustees and Advocates - WLTA); Cara Cavin, retired school librarian, (representing Wisconsin Educational Media and Technology Association - WEMTA); Pat Chevis, Stoughton Public Library, (representing Wisconsin Library Association - WLA); Mike Cross, DPI; Sally Drew, DPI; Ken Frazier, director, UW-Madison General Library Systems (representing Council of University of Wisconsin Libraries - CUWL); Peter Gilbert, director of Instructional Technology, Lawrence University (representing Wisconsin Association of Independent Colleges and Universities - WAICU); Sandra Melcher, Milwaukee Public Library (representing COLAND); John Nichols, retired public librarian (representing COLAND); Cal Potter, retired from state legislature and DPI (representing COLAND); Steve

*Please see Summit — on page 9*

### Channel

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Send comments about bylined articles to the authors. Direct other content inquiries or mailing list changes to editor Roslyn Wise at (608) 266-6439 or [roslyn.wise@dpi.wi.gov](mailto:roslyn.wise@dpi.wi.gov).

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## LSTA 2008 — from page 1

*Merging Shared Automated Library Systems* – \$35,000 has been awarded to the Indianhead Library System to merge two existing shared systems to allow for better efficiency. LSTA funds are an incentive to encourage mergers; the continuing costs of this service are picked up at the local and system level.

*Digitization* – \$33,890 has been awarded to allow public libraries to digitize resources that may be of unique or local interest and make them available on the web to all citizens of the state.

*Delivery* – \$75,000 has been awarded to help support the statewide delivery service backbone structure and to support delivery service to libraries in very northern part of the state.

*Seniors/Persons with Sensory Disabilities* – \$58,265 has been awarded to enable public libraries to help meet the informational needs of seniors and others who have sensory or mobility disabilities, including persons with vision loss and hearing loss and those who are homebound.

*Adult, Family, and Early Literacy* – \$244,267 has been award to promote and demonstrate the role of public libraries in improving literacy and reading skills for people having difficulty using libraries because of their educational, cultural, or socioeconomic background. ✨



### Statewide Resource Contacts

#### Cooperative Children's Book Center

4290 Helen C. White Hall, 600 N. Park St., Madison, WI 53706  
 ccbcinfo@education.wisc.edu ..... www.education.wisc.edu/ccbc/  
 Kathleen Horning, Director ..... (608) 263-3720

#### Milwaukee Public Library/Interlibrary Loan

814 West Wisconsin Avenue, Milwaukee, WI 53233-2385  
 Brian Hannemann, Interlibrary Loan Librarian ..... (414) 286-3082

#### WiLS/Interlibrary Loan

728 State Street, Rooms 464 and B106B, Madison, WI 53706-1494  
 schneid@wils.wisc.edu ..... http://www.wils.wisc.edu/  
 Kathy Schneider, Director ..... (608) 263-2773

#### Wisconsin Regional Library for the Blind and Physically Handicapped

813 West Wells Street, Milwaukee, WI 53233-1436  
 http://www.dpi.wi.gov/rll/wrlbph/index.html  
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#### Interlibrary Loan and Resource Sharing Team

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WISCAT User Support ..... 224-5394

#### Wisconsin Child Care Information Center

**Lita Haddal**, Director ..... (800) 362-7353 or (608) 224-5388

To send e-mail, use the following format (all lowercase letters):  
 firstname.lastname@dpi.wi.gov

## Library systems to share \$16.1 million in state aid

State Superintendent Elizabeth Burmaster announced that Wisconsin's 17 federated public library systems will share \$16.1 million in state aid during 2008.

Systems received the first of two aid payments, which will total \$16,138,000, in November. Aid supports regional cooperation and sharing of library resources so libraries can provide higher levels of service while reducing duplication. Library system funding is the state's primary program of support for public library service statewide.

"This state funding for public library systems allows communities to maximize the effectiveness of their local libraries," Burmaster said. "System aid supports materials and service sharing and open access arrangements for the region's residents. These funds also assist public libraries in helping to close the digital divide between those with computer and Internet access and those without."

Wisconsin's 388 independent public libraries have all voluntarily joined a public library system. The systems are regional library organizations created to improve public library services and to increase Wisconsin residents' access to library materials and services. Systems use funds according to plans developed and adopted by regional boards to meet the needs of each public library system area. Library system services include:

- ensuring that system residents have complete access to all public libraries within the system area. State residents made 33 million visits to public libraries and checked out nearly 60 million items last year.
- coordinating the loan of library materials among participating libraries to meet user needs. Annually, 6.4 million items are sent from one public library to another library in response to users' requests and are delivered by system-supported delivery networks.
- providing training and continuing education for local library staff to help them provide the best possible service to their communities.
- coordinating cooperative library technology projects. About 90 percent of the state's public libraries now participate in shared computer systems that offer users on-line catalog access to regional library holdings. All public libraries provide the public with the use of computers with high-speed Internet connections.

"As local and county governments strive to provide needed services while holding down property tax increases, public library systems help local libraries to make the most of their community's library investments," Burmaster said. "The Legislature and governor deserve praise for providing funding that allows the state's public libraries to operate in a coordinated and cost-effective manner." ❄

### 2008 state aid to public library systems

System	Amount	System	Amount
Arrowhead Library System <i>Rock County</i>	\$471,469	Northern Waters Library Service <i>Ashland, Bayfield, Burnett, Douglas, Iron, Sawyer, Vilas, and Washburn counties</i>	\$568,750
Eastern Shores Library System <i>Sheboygan and Ozaukee counties</i>	\$621,894	Outagamie-Waupaca Library System <i>Outagamie and Waupaca counties</i>	\$653,034
Indianhead Federated Library System <i>Barron, Chippewa, Dunn, Eau Claire, Pepin, Pierce, Polk, Price, Rusk, and St. Croix counties</i>	\$1,209,417	South Central Library System <i>Adams, Columbia, Dane, Green, Portage, Sauk, and Wood counties</i>	\$2,211,521
Kenosha County Library System	\$428,548	Southwest Wisconsin Library System <i>Crawford, Grant, Iowa, Lafayette, and Richland counties</i>	\$390,566
Lakeshores Library System <i>Racine and Walworth counties</i>	\$685,498	Waukesha County Federated Library System	\$1,030,465
Manitowoc-Calumet County Federated Library System <i>Calumet and Manitowoc counties</i>	\$335,499	Winding Rivers Library System <i>Buffalo, Jackson, Juneau, La Crosse, Monroe, Trempealeau, and Vernon counties</i>	\$825,223
Mid-Wisconsin Federated Library System <i>Dodge, Jefferson, and Washington counties</i>	\$810,948	Winnefox Federated Library System <i>Fond du Lac, Green Lake, Marquette, Waushara, and Winnebago counties</i>	\$952,262
Milwaukee County Federated Library System	\$2,877,586	Wisconsin Valley Library Service <i>Clark, Forest, Langlade, Lincoln, Marathon, Oneida, and Taylor counties</i>	\$915,778
Nicolet Federated Library System <i>Brown, Door, Florence, Kewaunee, Marinette, Menominee, Oconto, and Shawano counties</i>	\$1,149,542	<b>TOTAL</b>	<b>\$16,138,000</b>

## Reference and Loan develops BadgerLink Toolkit

**By Sally Drew, Director**  
Reference and Loan Library

The Reference and Loan Library has developed a BadgerLink Toolkit to provide public libraries with materials and support to assist in the use and promotion of BadgerLink resources. The BadgerLink homepage at <http://www.badgerlink.net> contains sections for educators, librarians, and parents.

The section for educators and libraries includes a manual for library staff that provides ideas for staff to use in promoting BadgerLink through library activities, programs, community service announcements, and communication with library users. Also included are a tip sheet for parents and students that describes the content and audience for each database appropriate specifically for children pre-kindergarten to 12<sup>th</sup> grade, a sample letter to parents to be sent at the start of the school year, an instruction sheet for using links and logo buttons to promote BadgerLink, and websites that contain learning tools and lesson plans.

The section for parents contains an introduction to BadgerLink and a list of tough questions and answers about BadgerLink resources.

One of the parent Toolkit components is a set of Resource Hunt cards that are designed to teach users how to use various resources on BadgerLink. The cards have questions on one side and answers on the other, and provide valuable experiences in learning specific techniques for using BadgerLink resources. There is a set of cards for parents and a set for students.

The BadgerLink Resource Hunt cards have been distributed to public libraries as a boxed set that can be

placed next to a public access terminal and used to train users in various aspects of searching BadgerLink resources. The development of the cards was funded through the Gates Foundation as part of DPI's statewide project. Retired school library media center specialists Cindy Turner and Cara Cavin assisted with the content development. Public library system youth service staff have expressed a willingness to assist library staff in ways to use the cards to promote BadgerLink use.

A template for the cards is available on the BadgerLink Toolkit site and

can be used by any Wisconsin library to print additional copies of the BadgerLink Resource Hunt cards. The web address is <http://www.badgerlink.net/toolkit-parents.html>.

Printed instructions, tutorials, and videos on using all BadgerLink resources are included in the section called "How to use BadgerLink" on the right-hand menu bar on the BadgerLink Homepage at <http://www.badgerlink.net>. Many of these training aids are short and address specific topics or databases. ☺

### Terrie Howe is new LSTA Coordinator and Continuing Education Consultant for DPI

The DPI's Public Library Development Team is pleased to announce that Terrie Howe has been hired as the new Library Services and Technology Act (LSTA) Coordinator and Continuing Education Consultant with the DPI, starting this position on January 7. This position was previously held by Peg Branson, who retired in July.

Terrie brings a wealth of experience to this position. In addition to experience in academic, school and special libraries, Terrie has worked for the Nicolet Federated Library System since 1991 in positions including Information Technology Consultant, Special Needs Consultant and Northeastern Wisconsin Intertype Libraries (NEWIL) Coordinator. In these positions she has had extensive experience with the LSTA program. Terrie has also been active in

professional organizations and was the 2007 WLA Conference Chair.

The DPI's LSTA Coordinator and Continuing Education Consultant is responsible for coordinating Wisconsin's federal LSTA program, coordinating Wisconsin's librarian certification program, and coordinating state level continuing education for public library staff and trustees. ☺



Terrie Howe

## Governor Doyle signs Senate Bill 214, applies to disclosure of library video surveillance recordings

By Mike Cross, Director  
Public Library Development Team

Senate Bill 214 has been passed by the legislature and signed by Governor Doyle, and has now been published as 2007 Act 34 (<http://www.legis.state.wi.us/2007/data/acts/07Act34.pdf>). The bill was introduced by Senator Ellis and Representative Kaufert after a library patron was viewed

committing a lewd act in the Neenah Public Library. The library, based on advice from the Wisconsin Attorney General's office, declined to disclose surveillance video recordings showing the patron until a court order authorized the disclosure.

The new law creates two new exceptions to the general requirement that a court

order be obtained before library records are disclosed that may indicate the identity of library users. The first new exception reads:

“Upon the request of a law enforcement officer who is investigating criminal conduct alleged to have occurred at a library supported in whole or in part by public funds, the library shall disclose to the law enforcement officer all records pertinent to the alleged criminal conduct that were produced by a surveillance device under the control of the library.”

This exception pertains to requests for surveillance recordings initiated by law enforcement officials. This exception requires disclosure only of surveillance video recordings pertinent to criminal conduct alleged to have occurred at the library.

The second new exception reads:

“If a library requests the assistance of a law enforcement officer, and the director of the library determines that records produced by a surveillance device under the control of the library may assist the law enforcement officer to render the requested assistance, the library may disclose the records to the law enforcement officer.”

This section makes it permissible, after the appropriate determination by the library director, for a library to disclose library video surveillance recordings to law enforcement officials in situations in which illegal activity or other dangerous or disruptive behavior may have been committed and recorded on a library video surveillance system. ☼

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## What's new at RLL, Part 2

By Martha Berninger, Reference and Interlibrary Loan Supervisor  
Reference and Loan Library

**Editor's Note: This is the second installment of a two-part article describing new books at the Reference and Loan Library.**

**Library staff and board members can learn about building stronger relationships with patrons in these new titles focusing on customer service.**

*Training Library Staff and Volunteers to Provide Extraordinary Customer Service* (Neal-Schuman, 2006) by Julie Todaro and Mark L. Smith advocates a continuous learning model that can help libraries achieve ongoing improvements in patron service. The authors provide a structure for assessing the needs of individual employees and the library as a whole, content that can be used in formal and ad-hoc training, and materials, techniques, and processes that libraries can use to implement a service improvement process.

*Library 2.0: a Guide to Participatory Library Service* (Information Today, 2007) by Michael E. Casey and Laura C.

Savastinuk is written by two of the most highly visible proponents of Library 2.0, a service model that is built around constant and purposeful change. The authors call for librarians to adopt a new approach to serving patrons with ever-increasing expectations for timely, relevant, innovative service. Library users who can contribute and edit content in blogs and wikis expect and demand participatory, user-driven services from their libraries. Casey and Savastinuk describe how libraries and librarians can get a foot-hold in this new reality, and then build and sustain momentum.

*The Virtual Reference Handbook: Interview and Information Techniques for the Chat and E-Mail Environments* (Neal-Schuman, 2007) by Diane Kovacs addresses the training needs of public and academic librarians who currently deliver online reference services. It offers extremely useful learning exercises designed to improve the core skills required of online reference librarians.

*Connecting with Reluctant Teen Readers: Tips, Titles, and Tools* (Neal-Schuman,

*Please see What's new — on page 12*

## DPI named 'Thinkfinity Rollout Partner' for Wisconsin

By Donna Steffan, Education  
Technology Consultant  
Instructional Media and Technology Team

Last October the Verizon Foundation announced the Wisconsin Department of Public Instruction as the *Thinkfinity* Rollout Partner for Wisconsin. Thinkfinity is a 21st century digital library for educators and the literacy community. Formerly known as MarcoPolo, these resources are the foundation of our Curriculum Resource Center located in WINSS. For several years Wisconsin PK-16 educators and Wisconsin community leaders in over 34 community literacy centers have focused learning opportunities around these lessons, interactive modules, authoritative web-links and the national literacy network matrix and other resources.

In March 2007 the Verizon Foundation combined the MarcoPolo resources with the national literacy network resources to launch *Thinkfinity*. Now Wisconsin educators and literacy leaders have a single, ever-expanding, digital resource library developed by eleven national content partners:

- American Association for the Advancement of Science
- International Reading Association
- National Center for Family Literacy
- National Council on Economic Education
- National Council of Teachers of English
- National Council of Teachers of Mathematics
- National Endowment for the Humanities
- National Geographic Society
- ProLiteracy Worldwide
- Smithsonian-National Museum of American History and

· The John F. Kennedy Center for the Performing Arts.

As the Wisconsin *Thinkfinity* rollout partner, the Instructional Media and Technology Team is providing ongoing professional learning opportunities throughout Wisconsin. At the team's fall regional workshops a breakout session attended by over 400 PK-16 educators provided an overview of *Thinkfinity*, including a snapshot of these 55,000+ 21st century resources. In November over 70 PK-12 educators and higher education faculty were trained as *Thinkfinity* field trainers at DC Everest Area School District, CESA 3 and Cardinal Stritch University. Training for another 25 field trainers is planned for February 7 and 8, 2008 at CESA 11 in Turtle Lake. Following this professional development, field trainers guide their colleagues in enhancing student learning and closing the achievement gap through effective integration these digital resources into their content instruction.

Over 30 Wisconsin educators who were MarcoPolo field trainers are engaged in a series of online courses designed to update and "bridge" their professional development skills to become *Thinkfinity* field trainers. Between January and April these educational leaders will experience online activities to update their knowledge of *Thinkfinity*, engage in numerous new interactive modules, discover viable content web links, and experience the literacy network resources for the first time. Depending upon the educators' previous knowledge and past experience with MarcoPolo and their interest in exploring each content partner's site, this course will take 5 to 15 hours to complete.

In early January, CESA Instructional Technology Consultants, district instructional technology coordinators, and higher education instructors will pool their expertise in online course development to create a course for Wisconsin field trainers to facilitate as one mode for teaching Wisconsin educators to effectively use these digital resources within the classroom or through other community learning centers, such as public libraries and literacy centers. This course will be available statewide.

Throughout the 2007-2008 school year *Thinkfinity* presentations are scheduled at various professional organization and WDPI conferences, including the Wisconsin Education Association Council Conference, the New Wisconsin Promise Conference, the Wisconsin Educational Media and Technology Association Conference, Wisconsin Assistive Technology Initiative, and the Wisconsin Teachers of Mathematics Conference. Each of these conference sessions will be tailored to the content educators present and context of the audience.

Towards the end of this school year some of these Wisconsin *Thinkfinity* field trainers will return to the virtual classroom for training designed to prepare them to become Certified Thinkfinity Trainers. These certified trainers will then train new field trainers during the 2008-2009 school year. To learn more about these professional development opportunities visit the Instructional Media and Technology Team webpage at <http://www.dpi.wi.gov/imt/index.html> or contact Donna Steffan at 608-267-1282 or [donna.steffan@dpi.wi.gov](mailto:donna.steffan@dpi.wi.gov).

**Trustee Corner*****Can libraries charge customers for interlibrary loan service?***

**By John DeBacher**, Public Library Administration  
Consultant  
Public Library Development Team,  
and  
**Sally Drew, Director**  
Reference and Loan Library

Public library staff, trustees, and public officials sometimes question whether or not it is legal to charge for interlibrary loan services. It is the position of the Division for Libraries, Technology, and Community Learning (Division) that public libraries cannot charge customers for interlibrary loan services and the Division has also advised on the appropriateness of various kinds of related charges. This article attempts to summarize these various responses. The term “interlibrary loan” (ILL) covers activities within public library systems related both to integrated library system activity and to interlibrary loan between public libraries, other types of libraries, and library systems.

***Charging library customers***

Charging customers fees for access to the information services provided by a public library, including interlibrary loan, violates the legislative policy and specific statutory provisions of the Wisconsin Statutes. This is true whether or not a public library is a member of a public library system. However, if the public library is a member of a public library system, charging fees for ILL also would violate a requirement for participation in the system.

A public library that is a member of a public library system must provide its users access to the interlibrary loan service of the public library system, and it must fill interlibrary loan requests from other system member libraries within the system area. However, it is not required to forward an interlibrary loan request from a library user to any library or library organization that charges a fee for this service. If it does so, the library cannot pass the fee on to the library user.

A public library system may not charge a library user a fee for handling or filling an interlibrary loan request within the system service area, or for referring the interlibrary loan request to a library outside of the system area.

Public libraries and public library systems are required to certify each year to the Division that public library service is free to residents of the municipality and the system. A public library that charges fees for information services, including interlibrary loan, cannot make this certification. Failure to do so could result in penalties to the public library and the public library system. The Attorney General has also issued a specific opinion establishing that a library cannot charge a customer for holding materials on reserve to be picked up by the patron. Neither can libraries charge a customer for access to online searching of remote commercial bibliographic and information databases. (73 Atty. Gen. 86)

Libraries have asked if patrons could instead be asked to contribute to a library donation fund and then the library could pay fees charged by other libraries or organizations from that fund. While libraries may receive and expend donation funds, there cannot be any connection between the payment into the fund and the provision of the service. Everyone must be provided the same service. A person who did not contribute to the fund could not be denied receiving the same service as the person who did so contribute.

Libraries also ask if a delivery or processing fee may be charged for an item placed on hold in a library’s integrated library system (ILS), or to recover the cost of notifying the customer when the item is available. It is our opinion that such a fee would not be permissible and would violate the provision for free library services. On the other hand, the Division has been asked whether it would be permissible to impose a fine on customers who failed to pick up items that were placed on hold through the ILS. It is the Division’s informal opinion that such a charge would be similar to a fine charged to a patron for failing to return a book on time and, as such, could be considered a “reasonable regulation as the library board prescribes in order to render its use most beneficial to the greatest number.” s. 43.52(2)

In response to another question, the Division staff has offered the informal opinion that a library could charge

*Please see Trustee — on page 9*



## Trustee — from page 8

for home delivery of an item to a patron as long as the person has the option of picking up the item free-of-charge. This opinion would not apply to delivery service provided to persons who cannot leave their home, leave only with assistance, or have other special needs that would prevent them from coming to the library.

### *Charges between libraries*

A public library system may not charge a member library a fee for handling or filling an interlibrary loan request with the system area, or for referring the interlibrary loan request to a library outside of the system area.

It would be legal, but not desirable, for a public library system to pass on an interlibrary loan charge from a library or library organization outside of the system service area to a member library. However, that charge could not be passed on to the library user, and the public library would not be under any obligation to pay the charge.

Generally, interlibrary loan among most public libraries on a statewide basis is conducted reciprocally. Public library systems and member public libraries are not required to fill or facilitate the filling of interlibrary loan requests received from other library systems or libraries outside of the system area. This is done on a voluntary, reciprocal basis, or through agreements between systems and libraries. However, without the cooperation involved in this program of reciprocal lending, patrons from all library system areas would be denied access to the information resources they need. It is the intent of the legislature that public libraries and systems work cooperatively to share

resources and materials. The declaration of policy in the library statute states that “the most effective use of library resources in this state can occur only through interlibrary cooperation among all types of libraries and the effective use of technology.” s. 43.30 (1) (e)

Although the state superintendent is required to contract with library resource providers in- and outside of the state for specialized library materials and information not available at the Reference and Loan Library, the extent of those contracts is determined by the amount of funding made available by the Legislature for this purpose.

The basis for many of the Division’s interpretations is the Attorney General’s opinion issued in 1984. In that opinion, the Attorney General adapted the following guideline for determining which services provided by a library were required to be free under s. 43.52(2), Wisc. Stats.:

If the transaction involves the satisfaction, with library resources, of a patron’s request for

information (whether for educational, recreational or entertainment purposes), such a transaction is a “library service.” Other transactions, not involving the furnishing of information, though carried out by a library, would not be a “library service”...Perhaps the essential distinction that is operative here is between those services which are reflective of a library’s inherent information providing function and those ancillary services which are not unique to libraries and which can be just as effectively provided in non-library settings. 73 Atty. Gen 86

Further information on library charges and fees for services can be found in a previous Trustee Corner published in the Volume 40, Number 3 issue of *Channel*: <http://dpi.wi.gov/channel/pdf/chn4003.pdf>.

Additional information on interlibrary loan and links to the Wisconsin Interlibrary Loan Guidelines are available here: <http://dpi.wi.gov/rll/indill.html>. ☼

## Summit — from page 2

Sanders, DPI; Jim Trojanowski, director, Northern Waters Library Service, (representing System and Resource Library Administrators’ Association of Wisconsin - SRLAAW), and Melinda Orebaugh, director, Library and Health Information Services, Gundersen Lutheran Health System (representing Wisconsin Health Science Library Association - WHSLA). Questions regarding the work of the Executive Planning

Group can be directed to Kathy Pletcher (pletchek@uwgb.edu) or any member listed above.

For more information about how to participate in pre-Summit activities or track progress on the Strategic Visioning process, visit the COLAND web site at <http://dpi.wi.gov/coland/vision.html>. Everyone is encouraged to respond to the questions on the COLAND web site. ☼

## Best Practices for Public Libraries—Plan to Plan

### *Resolve to Plan in the New Year*

**By John DeBacher**, Public Library Administration Consultant  
Public Library Development Team

There are many good and noble resolutions you, as a public library trustee or director, could pledge for the New Year. Set measurable (and achievable) goals for the director or staff. Review sections of the policy manual you've been avoiding. Write some grants for new technology. Offer more training opportunities to staff. But one New Year's resolution, if carefully crafted and carried out, might help you to carry out them all: develop (or revise) your library's strategic plan this year!

Planning can seem like a daunting task to take on. Library trustees may be uncomfortable charting a direction for the service they do not operate on a day-to-day basis. Library directors may worry that goals will be adopted for which there will be no funding. Staff may have concerns that their duties will shift markedly or that their position will be eliminated. The governing body might have concerns that the library will chart off into unsustainable waters. And the public may worry that the library will abandon services they have come to expect. But if all parties are involved in the process, the results should be satisfying to all.

Planning provides a number of benefits to the library and its community, including

- Confirmation and articulation of the library's purpose
- Analysis of use, needs, and resources
- Establishing a framework for priorities and decision-making
- Identification of opportunities and problems
- Consideration of the community's needs in the development of the library's program
- Tangible evidence that the library is managed effectively
- Qualification for additional outside funding sources

Each library board needs to determine the appropriate level of complexity for the library's planning process. Such factors as the size of the community, the local planning resources available, the length of time since the last planning process, and other identified needs may

affect the process. This brief article cannot substitute for planning resources, literature or consultants to lead you to effective results, but directors and board members can determine what is needed and then take appropriate action to get there. A good planning process is analogous to a successful banquet recipe: the necessary resources, tools, and ingredients must be assembled; the appropriate cook selected; sufficient time allocated for mixing and cooking; then assemble the community to enjoy the results.

If your library has a strategic plan that is regularly reviewed, adapted, and implemented, then the process may be fairly simple and straight-forward. You might collect input from the community to determine if the library's mission and vision is still appropriate, and adapt the plan to newly perceived needs. If the library has not developed a plan in some time, then a more comprehensive process may be in store.

#### *PLA's New Planning for Results*

In 2001, the Public Library Association published *The New Planning for Results: A Streamlined Approach*, by Sandra Nelson (Chicago: ALA, 2001). The book presents a comprehensive planning process for public libraries, with appropriate steps, timeframes, and necessary work-forms to achieve results. The method encourages the use of a committee and facilitator and outlines a five-month process that involves assembling participants and information, determining the library's service responses, establishing goals and objectives, developing the final plan, informing the community, and putting it all into action.

The selection of an appropriate facilitator is an important consideration, and the right choice will depend on local circumstances. While it is tempting to hire a library planning professional to conduct the process, the cost can be prohibitive. Sometimes a community leader or local official has the skills to conduct the process, but if they do not, the outcome may be misdirected or poorly developed. While a library professional can bring certain knowledge of the field to the discussion, sometimes a facilitator

*Please see Best Practices — on page 11*

## Changes to Common School Fund now in effect

By **Kate Bugher**, School Library Media Consultant  
Instructional Media and Technology Team

With passage of the state budget in October 2007, Wisconsin Statute 43.70(3), which guides use of the Common School Fund (CSF), was amended. With the amendment school districts may now use up to 25 percent of the CSF moneys received in a fiscal year to purchase school library computers and related software to be housed in the school library. These purchases must be made in consultation with the school district's library media coordinator, as per Wisconsin Administrative Code PI 8.01(2)(h).

The following guidelines have been established to assist school districts with this change:

- Only computers and related software for the school library and its instructional program may be purchased under this amendment. Related software refers to that which comes pre-installed on the computer at the time of purchase.
- As with other library materials, the items purchased must be housed in and made accessible from the school library for their lifetime.
- All computer purchases made with the "up to 25% of CSF" must be coded in WUFAR category 222000, Object Code Object Code 550 (Equipment Additions), or Object Code 560 (Equipment Replacement).

- All software purchases must be coded in WUFAR category 222000, Object Code 435 (Computer Software Programs).
- The total expended using the Common School Fund in Object Codes 550 and 560 may not exceed 25% of a district's CSF allocation for that fiscal year.
- If a district does not expend the entire Common School Fund within Function 222000 Object 430, it will be required to provide additional detail in the Financial Annual Report for expenditures coded in Object Codes 550 and 560.

This change applies to the 2007-08 school year based on the school district's 2008 CSF allocation; it does not apply to any unspent CSF monies received in a prior year. School districts received notification of their official 2008 CSF Library aid estimate in January 2008.

All existing CSF guidelines remain applicable and in effect. Updated information on the Common School Fund and guidelines for its use is available at <http://www.dpi.wi.gov/sfs/comsch.html>.

Further clarification can be obtained by contacting Kate Bugher, School Library Media Consultant, [kathryn.bugher@dpi.wi.gov](mailto:kathryn.bugher@dpi.wi.gov), 608-267-9287 or Brad Adams, Finance Services Consultant, [bradley.adams@dpi.wi.gov](mailto:bradley.adams@dpi.wi.gov), 608-267-3752. ☼

### Best Practices — from page 10

who is not from the field can ask clarifying questions that help to provoke thought, challenge assumptions, or direct the flow of discussion. If you do not have budget to hire a professional, you may be able to recruit an experienced facilitator for little or no expense from your local businesses or schools. Your regional technical college may offer a quality assurance program or specialists to assist businesses and non-profits in the area.

However you decide to go about your strategic planning, make it happen! Be sure to make the process inclusive of library staff, local officials, community members, and the business community. Be prepared to provide the necessary resources and information. Plan your planning so that the participants know how much involvement and responsibilities they will have. Once the plan is completed,

promote it, execute it, re-allocate resources as necessary, measure and review results, and make appropriate adjustments, but not unilaterally. A good planning process includes a plan for evaluation and review. Good luck!

For more information consult Trustee Essential 11: Planning for the Library's Future <http://dpi.wi.gov/pld/te11.html>, and the *Wisconsin Public Library Standards*, <http://dpi.wi.gov/pld/standard.html>.

Best Practices is an occasional column addressing general issues facing public library directors and their boards. If you have issues or ideas for future columns, please contact John DeBacher at 608-266-7270 or [john.debacher@dpi.wi.gov](mailto:john.debacher@dpi.wi.gov). ☼

## What's new — from page 6

2006) by Patrick Jones, Maureen L. Hartman and Patricia Taylor tackles the problem of 12 to 18 year olds who can read, but choose not to read. The authors profile reluctant readers, describe root causes, and share techniques that librarians, concerned parents and educators can use to engage unwilling readers. The second part of the book, "Titles That Work," describes the type of books that can hook reluctant readers. It provides reading lists for fiction, non-fiction, graphic novels and comics, from a variety of authoritative sources, the authors, and Voice of Youth Advocates and Young Adult Library Services Association (YALSA). The final part, "Tools that Work", presents book talks, sample reading interest surveys, and an extensive bibliography.

**These new books can help libraries cost-effectively develop and market new programs and services.**

*Libros Esenciales: Building, Marketing, and Programming a Core Collection of*

*Spanish Language Children's Material* (Neal-Schuman, 2007) by Tim Wadham combines reading lists of notable and award winning titles, innovative program materials, and recommended implementation strategies. Wadham describes how the diversity of Latino community can inform collection development strategies, and he describes methods for creating a bilingual and Spanish-language children's collection. He shares ideas for building programs around Latino folktales and folklore and rhymes, riddles and fingerplays. Over sixty pages are devoted to reading lists; another thirty cover sources for reviews, publishers and vendors.

*Every Nonprofit's Guide to Publishing: Creating Newsletters, Magazines & Websites People will Read* (Nolo, 2007) is written by two publishing industry veterans, Cheryl Woodard and Lucia Hwang. Woodward is a cofounder of PC Magazine, PC World, and Macworld, and Lucia Hwang is a journalist and magazine writer currently editing a nonprofit association's magazine. They aim to help

organizations with more creativity and passion than dollars to market themselves effectively. The book describes the publishing process, how to create a budget, hiring staff, writing content for print and the Web, designing and printing/publishing publications, newsletters, and websites, distributing, promoting and advertising, and connecting with readers.

*Nonprofit Marketing Best Practices* (Wiley, 2007) by John J. Burnett teaches recognized marketing techniques, and how they can best be applied in the nonprofit environment. A different approach to marketing is called for in the nonprofit arena because nonprofits offer services and service products rather than tangible goods. The author has learned how to effectively market nonprofits through his work with a range of nonprofit organizations including The American Red Cross, the National Parks Service, and the Boys Club of America. ☼



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