

COLORADO PUBLIC LIBRARY STANDARDS



COLORADO
Department of Education
Colorado State Library



INSTITUTE of
Museum and Library
SERVICES

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INTRODUCTION

The standards serve as an important tool in measuring a library's success in fulfilling its stated mission and role in the community. This document is intended to spark debate, discussion, evaluation, planning, and action in all public libraries. The following principles guided the development:

1. Consider the public library's role in sustaining a civilized society.
2. Value the public library's role as a community learning institution.
3. Understand the public library's role as a reflection of cultural heritage.
4. Recognize the diversity and uniqueness of libraries across the state.
5. Understand the needs of the communities that libraries serve.
6. Value intellectual freedom and access for all to information.
7. Acknowledge the skills, talents, and contributions of library staff.

Goals

The goals of the standards are to:

1. Promote quality library service to all Coloradans.
2. Inform community users about what they can expect from their library.
3. Assist library staff in connecting with the communities they serve.
4. Provide an authoritative document to which library administrators and supporters may refer when justifying requests for funds.
5. Assist library leaders in planning, administration, and professional development.

The Colorado public library standards serve as models for services, resources, and information that are available in libraries across the state. They are not meant to stand by themselves; rather, they are intended to enhance local planning efforts crafted to identify service goals that will allow the library to respond to the unique interests and opportunities in its community while achieving a consistent standard of library offerings across the state.

The Standards and Colorado Library Law

Public libraries are established and maintained according to the provisions of [the Colorado Library Law¹](#) (§24-90-101 et seq) which provides a basic definition of a public library. This definition is used to determine eligibility for state funding for library materials, or when libraries receive funding or other services from the State Library. It is also used to determine which libraries are required to provide statistical data in compliance with state and federal requirements.

¹ <http://www.cde.state.co.us/cdelib/LibraryLaw/Index.htm>

What are Standards?

The Standards represent a snapshot in time. Library planning and operations are inherently fluid in responding to what is sometimes a rapidly changing social, fiscal, and technological environment.

This document can inform but does not replace a library's strategic plan. While the standards attempt to identify current key issues, services, and best practices in Colorado public librarianship, they are not intended to be a detailed road map to each library's future.

Each standard has a short introductory section followed by a checklist of 'basic' elements that library leaders should consider when planning and guiding operations. Aspirational 'future-focused' guidelines are also included.

How to Use these Standards

As an aid in planning, the checklists provide the means by which library stakeholders can discuss and determine how a library addresses or should address each standard category.

These checklists are not intended to be a one-size-fits-all set of elements that all libraries must meet. Some libraries now plan and carry out activities that exceed many or all of those listed, while others may be constrained by resources or circumstances in ways that make achieving many of the basic ones difficult. Every community is different. What is important is that the director, staff, board, and community constantly review where you are, where you want to be, and what it will take to get there. These checklists are intended to provide guidance for that journey.

Supplemental information in the appendix offers resources for addressing some sections. When pertinent, tables are referenced and available on the State Library Standards website with state and national statistical data. Local libraries will need to decide how best to meet or exceed them for the benefit of their communities. The State Library offers consulting support and resources for meeting standards.

This document is intended for use by librarians, boards, staff, governing officials, members of funding agencies, and community support groups involved in planning at the local level, and within the context of regional and state library services. For example, library directors may choose to review each standard by bringing them one by one to their board meetings throughout the year. Staff, community members, and other stakeholders are encouraged to attend these discussions about how the standards apply to their library.

The standards and resources plus brief introductory videos about the standards are available under the State Library's public library [link](#)².

Action Items and Next Steps

Ultimately, how library stakeholders view and adopt these standards will determine the actionable next steps important to planning and growing a library's services and ideas on which to act. For instance, a list of small administrative to-dos, key policies, adjustments, or the need for a more thorough review of existing practices, etc. might turn up. A few major initiatives may float to the top of the planning priority list, such as outcomes that are more specific and metrics to measure progress. Examples may include the creation of a comprehensive risk management strategy that identifies a host of business assets and procedures for assuring their survival.

² <http://www.colibrarystandards.org/>

DEFINITION OF A PUBLIC LIBRARY IN COLORADO

The legislative declaration in the Library Law, CRS §24-90-102, states that it is the policy in Colorado to ensure equal access to information and materials. Section 105 of the Library Law directs the State Librarian to develop service standards to guide library development. Any entity wishing to be defined as a public library in Colorado must meet or exceed the following criteria:

Legal Responsibilities

1. Be legally established under Colorado Library Law (CRS §24-90-101 et seq.)
2. Comply with Colorado Library Law rules and regulations, and any other local, Colorado, or federal laws that affect library operations.
3. Have dedicated space that meets the criteria of the Americans with Disabilities Act (ADA) applicable to libraries.
4. Have a “Library Governing Authority³” or “Governing Authority” submit statistical data for the Public Library Annual Report in a timely manner.

Library Administration and Management

5. Provide free access to basic services as defined by written policies regarding lending, borrowing, and circulation services as approved by the library's Governing Authority.
6. Have paid staff present during all hours of service. Pay of staff must be based on cost of living standards within the community.
7. Prepare and utilize a long-range strategic plan for continuing improvement.

Access and Services

8. Have an ongoing collections budget from local tax funds and a collection management plan for the purchase of materials and electronic access.
9. Provide at least one device with public access to the Internet, a printer, an email address, a website, an online information catalog, and databases.
10. Be open to the public a minimum of 20 hours each week. These hours will include morning, afternoon, evening, and/or weekend hours based on users' and potential users' disposable time. All service outlets of libraries providing multiple access points must be open to the public for no fewer than 20 hours a week.

³ e.g., board of county commissioners, city council, town board, or library board of trustees, as the context requires.

DEFINITION OF A PUBLIC LIBRARY IN COLORADO (CONT'D)

Resource Sharing

11. Be a member of and fully participate in the Colorado Libraries Collaborate (CLC) program, extending privileges and services to state residents according to the CLC [agreement](#)⁴.
12. Comply with the [Interlibrary Loan Code for the United States](#)⁵ and adopt the [Colorado Interlibrary Loan Best Practices](#)⁶ lending and borrowing materials through the statewide interlibrary loan network according to that code.
13. Be a member of the [Colorado Library Consortium \(CLiC\)](#)⁷ and use its services as appropriate.

⁴ <http://www.cde.state.co.us/cdelib/clc/users>.

⁵ http://www.ala.org/Template.cfm?Section=InterLibrary_Loan&template=/ContentManagement/ContentDisplay.cfm&ContentID=31579

⁶ <http://www.coloradovirtuallibrary.org/wp-content/uploads/2016/02/colorado-interlibrary-loan-best-practice-revised.pdf>

⁷ <http://www.clicweb.org>

COLLECTIONS

Outcome

The community will consistently have relevant, accurate, and current information to inform decision-making about areas important to their well-being and quality of life.

Overview

A public library assembles, organizes, presents, and makes easily and readily available a variety of print, non-print, and electronic materials and information. Collections need to be current, representative of all perspectives, dynamic, and data-driven. Efforts are made to effectively present or “merchandise” the collection.

The quality of a library's collection is measured by a variety of factors, including use, currency and interest to the community.

The collection must be continually updated to meet the changing needs and interests of the community. Materials are selected in anticipation of, as well as in response to, requests from library users. Purchasing decisions are based on budget, use, and turnover.

Participation in regional and/or statewide resource sharing is encouraged. The library is a member of CLiC, in order to participate in courier service and benefit from discounts on library materials.

The quality of a library's collection is measured by a variety of factors indicating use, currency, and interest to various community members. Tables are provided in the Collections section on the State Library's [standards website](#)⁸. The data provides information on what other libraries in Colorado, as well as other libraries nationally, are reporting in terms of: (1) materials expenditures per capita, (2) circulation per capita, and (3) collection turnover.

These tables will assist libraries in determining the quantity of materials held per capita; however, it is also important to consider “quality” vs. “quantity” when making decisions about the collection. Thus, the data are meant to inform and be descriptive, not prescriptive.

⁸ <http://www.colibrarystandards.org/>

COLLECTIONS CHECKLIST - BASIC

1. Policies and procedures to effectively manage the collection are in place and reflect the library's strategic plan and community needs. The Collection Management Plan includes policies and procedures for:
 - Selection and deselection
 - Conservation/preservation
 - Procedures for handling requests for reconsideration of materials
 - Procedures for handling gifts and donations
 - Procedures for non-circulating items
2. Review the collection management plan within each three-year period.
3. Collect materials and provide access to information representing a wide variety of interests and viewpoints.
4. Provide online media in various current formats, including physical and downloadable materials, as well as other non-print materials, to meet the needs of the community.
5. Provide materials in formats appropriate to the needs of special population groups.
6. Evaluate items in the collection regularly for retention, replacement, or withdrawal according to the library's collection management plan.
7. Place orders at regular intervals throughout the year to ensure a steady flow of new materials for the public.
8. Organize and display the collection to facilitate online and in-library browsing and retrieval.
9. Ensure that library records comply with current cataloging standards to facilitate public access and resource sharing.
10. Ensure all users have access to all materials, unless limited by library policy or other legal restriction, such as age.

COLLECTIONS CHECKLIST – FUTURE-FOCUSED

1. Provide a process for community members to participate in the selection of materials, including when they lend expertise to collection topics.
2. Allocate funds for purchasing materials and expend them based on the Collection Management Plan and other plans directing library activities. To measure this, determine materials expenditures per capita (see [tables](#)⁹).
3. Ensure that the collection reflects the ethnic, cultural, and language diversity of the community.
4. Track and report statistics on various formats for currency and relevancy based on statistics and data that reflect collections and circulation statistics per capita and turnover rates (see [tables](#) on State Library website) as well as what is needed for annual reporting and planning.
5. Maintain an appropriate collection size based on the library's legal service area population (LSAP).
6. Include unique items that, when loaned through the library, make it economically feasible for community members to “try before they buy,” allowing sharing of resources at a community level. Some Colorado examples include maker spaces with equipment for idea exploration, creation, and experimentation; non-book/non-media, recreational material (e.g., bicycles, musical instruments, fishing poles, cake pans); educational equipment (telescopes, robots, microscopes); home tools (electricity use monitors, seeds, garden tools), and locally created content (e-books, music, audio stories, art).
7. Remove fines and fees on children's material to encourage the dynamic use of collections by children. State Library research indicates that fines and fees are a barrier to low-income families' use of the public library. See the [whitepaper](#)¹⁰ for further information.
8. Follow the best practices of the Society of American [Archivists](#)¹¹, if the library houses local history/archive collections.

⁹ <http://www.colibrarystandards.org/collections/>

¹⁰ <http://spellproject.weebly.com/uploads/1/5/3/3/15331602/spellwhitepaperfinal.pdf>

¹¹ <http://www2.archivists.org>

A GUIDE TO TURNOVER RATE

Turnover Rate measures the activity of a library's collection, indicating the number of times each unit of library material would have circulated during the year if circulation was spread evenly throughout the collection. The turnover rate is determined by dividing the number of circulations by the number of items in a particular section of the collection. For example, if you have a section of the collection that contains 1000 items and these items have circulated 1,200 times in the previous year, the annual turnover rate is 1.2. The average item in this section circulated 1.2 times within the last year. If you have another section that contains 2,000 items and these items have circulated 1,500 times, the circulation rate is 0.75. If a section has a relatively high turnover rate, it is one indication that more items may be needed to meet demand.¹²

To determine the Turnover Rate:

Formula: Annual Circulation ÷ Item Holdings = Turnover Rate

Example: A library with a LSAP¹³ of 90,000 holds 500,000 items (books, videos, audio, etc.) and annual circulation is 1,500,000, the Turnover Rate = $1,500,000 \div 500,000 = 3$.

¹² Source: [LILI, Idaho Commission for Libraries](#)

¹³ LSAP: Legal Service Area Population

COMMUNITY ENGAGEMENT

Outcome

The community is strengthened through the active facilitation and/or participation by the library in efforts to gather input, engage in meaningful discussions, and act in partnership to support community-wide growth and transformation. Library affiliates (friends and/or foundation organizations) are aligned to strengthen the connections between the library and the community.

Overview

The community is integral to any decision made concerning library operations. Libraries and communities have an interdependent relationship. Communities provide funding, opportunities to collaborate and advocate for the library's work and role in meeting community needs. Libraries contribute to the economic health of the community, collect the memories of the community, and provide a place where people can explore, learn, access resources, share ideas, and be transformed. The library is also an asset that can be of great value when addressing community-wide issues and opportunities.

*Libraries and communities
have an interdependent
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The Library Governing Authority and staff search for opportunities to cooperate with other community organizations, including other libraries, governmental agencies, nonprofit organizations, and the private sector in order to embed librarians and library services in the community and ensure healthy communities that understand the value of libraries.

Library staff uses many means to reach out and partner with the community in order to stay knowledgeable and engaged. In addition, opportunities for community involvement within the library are available to volunteers. Cooperation may include sharing of resources, staff expertise, training opportunities, or other joint activities. Staff representation in other community organizations is essential in complying with this standard.

The library has a friends group and/or a foundation that assists the library with fundraising, advocacy and outreach in the community. Resources from these organizations supplement rather than replace the library's operating budget.

COMMUNITY ENGAGEMENT CHECKLIST - BASIC

1. Embrace the importance of community-wide connections by meeting with and supporting local groups.
2. Establish cooperative agreements between the library and other agencies for shared programs and services.
3. Participate as an active member and leader (and host) of community groups.
4. Recruit community volunteers for support as defined in the library's written volunteer policy.
5. Ensure that a staff person is responsible for volunteer coordination and training.

COMMUNITY ENGAGEMENT CHECKLIST – BASIC (CONT'D)

6. Maintain a formal friends group or foundation that meets on a regular basis with a library staff liaison present, and follow the [national guidelines](#)¹⁴ for the role of each.
7. Involve library staff, friends, and the community in the library's long-range plan and fundraising activities.
8. Make clear distinctions about the responsibilities of the friends group or foundation, and keep funds raised by these groups separate; do not mix with library operating expenses.
9. Collect statistics and conduct research, such as customer surveys, community studies, citizen surveys, and other means appropriate to evaluate library services and resources.
10. Use statistics and other data collection to communicate impact and relevance of library services to the community.
11. Build "social capital" through civic engagement.

COMMUNITY ENGAGEMENT CHECKLIST – FUTURE-FOCUSED

1. Convene community meetings involving multiple stakeholders to address community aspirations and issues.
2. Encourage community members to participate in conversations about issues that are important to them, including those beyond library services. Invite partners to work together on plans that address community needs from multiple perspectives.
3. Collect, organize, and provide information about community groups and issues.
4. Participate in (or convene) cooperative planning and programming with community groups. Share associated costs when feasible.
5. Embed library staff in community commissions, boards, neighborhood groups, organizations, and chambers.
6. Invite community groups and/or businesses to participate in volunteer activities.
7. Recruit mentors to assist in programs, labs, STEAM/STEM, art, and other community-focused activities.

¹⁴ <http://www.ala.org/united/sites/ala.org.united/files/content/friends/orgtools/role.pdf>

FACILITIES

Outcome

Library spaces offer the community a compelling invitation to explore, gather, learn and engage, and ensure equitable access to resources through infrastructure and up-to-date technology.

Overview

Libraries serve as a platform for learning, inspiration, and innovation in their communities. Library facilities are designed to address these community needs. Carefully planned design allows for a wide range of purposes, including reading, studying, meeting, and playing that strengthen community identity and social bonds. The library is also a virtual space where e-content is readily available anytime and anywhere. Facility management is driven by policies that address usage, maintenance, and improvement. Meeting room policies are perhaps the most litigious and should be carefully composed for clarity.

Library staff, leadership, and governing authority need to be aware of and accommodate changing technologies and community needs.

Library facilities are an anchor for economic development and neighborhood vitalization, strengthening community identity. Library staff assesses community priorities via an analysis or survey.

Library facilities should be safe, secure, comfortable, engaging, efficient, and inviting to allow for flexibility of service, growth, and changes in community priorities. Facilities should be designed to support the library's long-range plan. Building size and spaces will vary by community size, community demand, and budget. Facilities should include space for quiet reading and reflection, and for small and large group meetings, with areas to create and innovate. Partnerships with other entities to accommodate these needs should be considered. It is important to think of sustainability when managing libraries or planning for additions or new buildings.

Libraries should provide safe and easy access to library services. A convenient method to return materials throughout the service area is important. Sufficient lighting, signage, and space to serve the public are essential. All safety and fire codes should be followed, along with proper ADA access.

Library staff, leadership, and governing authorities need to be aware of and accommodate changing technologies and community needs. Technology-refresh programs should be part of a facilities plan, along with proper connectivity and telecommunications infrastructure. A dedicated Internet connection with adequate bandwidth to meet the community's size should be provided.

FACILITIES CHECKLIST - BASIC

General

1. Meet current local safety and fire codes.
2. Ensure accessibility to all members of the community, conforming to [ADA standards](#)¹⁵.
3. Seek the professional expertise of a library planner and/or library architect for any new construction or major remodeling.
4. Dedicate expenditures for capital improvements and facility maintenance.
5. Develop policies relating to effective public use of facilities, including a meeting room policy.

Exterior

6. Install signs in the community that direct people to the library.
7. Provide a well-lit exterior with signage that clearly identifies the building from the street.
8. Prominently post hours of operation outside the library.
9. Maintain sufficient, well-lit parking located near or adjacent to the facility.
10. Provide a convenient, safe book return location(s) during the hours the library is closed.

Interior

11. Provide a well-designed interior that encourages self-directed use of the library.
12. Offer adequate programming and space to fulfill the library's stated mission and goals. Examples of space include:
 - a) Storytime
 - b) Study
 - c) Quiet
 - d) Public meeting
 - e) Programming
 - f) Accessing and utilizing materials
 - g) Public computing
 - h) Space to create individual content and projects
13. Maintain separate areas for staff workspace(s) and breaks.
14. Provide storage space.
15. Allow easy access to electrical and cabling outlets to support current technology.

¹⁵ <https://www.ada.gov/2010ADAstandardsindex.htm>

FACILITIES CHECKLIST – FUTURE-FOCUSED

1. Maintain usage statistics and compare them to space allocation standards to ensure library facilities meet community demands.
2. Prepare long-range facility plans that address projected growth. Review facility plans annually and revise at least every five years. Maintain written policies and guidelines necessary for maintaining and improving facilities.

FINANCE

Outcome

The community is well served by a library that is appropriately funded and transparently administered to best meet community needs.

Overview

Colorado public libraries are supported primarily by local tax revenues. The Library Governing Authority seeks and secures funding from public and private sources and monitors and expends these funds with integrity and to support the goals in the library's strategic plan.

Libraries earn the public trust by being accountable and transparent about the use of public money.

Many libraries have a separate Friends organization and/or Foundation with a 501(C) (3) status to manage donations for library projects, programs, or services. All fund-raising, grants, and donations shall be considered supplemental to local tax revenue.

Library districts follow fiscal procedures consistent with state law in preparing, presenting, and administering the budget. Unless exempted by state law, an annual audit of the library's financial records is required. All libraries should have a financial plan.

Libraries earn the public trust by being accountable and transparent about the use of public money. Libraries are proactive in these responsibilities and demonstrate transparency by distributing and making information available on a consistent, reliable basis.

FINANCE CHECKLIST - BASIC

1. Develop an annual financial plan/budget based on the library's goals and objectives for approval by the Library Governing Authority.
2. Develop a long-term finance plan (minimum five years) in conjunction with the library's strategic plan to identify resources that are available to address future needs of the community. The plan should include categories and amounts.
3. Prepare and review monthly financial statements that include comparison to budgeted amounts and make financial information available to the public to ensure responsible and transparent use of funds.
4. Commission and accept an independent annual audit as required by law for library districts. Other library types participate in audits with the Library Governing Authority.
5. Library Governing Authority reviews and approves the budget (in the case of governing boards) or reviews the budget (in the case of advisory boards).
6. Follow financial management guidelines that include, at a minimum, policies on budgeting, audits, capital assets, investments, purchasing, contract approval and borrowing, and follow fiscal procedures consistent with federal and state law and local government requirements.
7. Explore local, state, and national fund-raising opportunities, sponsorships, partnerships, grants, donations, and gifts for special projects or as a supplement to local funding.
8. Use group purchases and collective bargaining opportunities as a way to expend funds effectively and efficiently.

FINANCE CHECKLIST – FUTURE-FOCUSED

1. Develop fund balance policies to ensure appropriate levels of fund balances at all times; develop policies to address situations when targeted fund balances are not achieved.
2. Encourage community financial contributions through friends, foundations, philanthropists, and other organizations.

GOVERNANCE

Outcome

The library is an efficiently managed community resource that provides high-value services through the effective stewardship of public funds.

Overview

Public libraries in Colorado are established by a municipal or county government or as a library district under Colorado Library Law. The Library Governing Authority adopts and provides oversight of budgets, supervises the library director, adopts policy, and sets strategic direction. The Library Governing Authority can be the library district governing board, city council, town manager, or other civic leadership.

Library governing and advisory boards have the responsibility to advocate for the library, to identify community priorities, to follow state and national laws applicable to libraries, and to plan for the future of the library.

Colorado recognizes two types of library boards, governing (in library districts) or advisory (in most city, county, municipal, and joint jurisdictions). The responsibilities of a library governing board are clearly defined in the Colorado Library Law. Conversely, a library advisory board gets direction from the Library Governing Authority and represents the community by advising the library director.

The library advisory board's responsibilities will vary from city to city and county to county; however, both library governing and advisory boards have the responsibility to advocate for the library, to identify community priorities, to follow state and national laws applicable to libraries, and to plan for the future of the library. In order to stay current and informed, both the library director and the library governing or advisory Board participate in activities sponsored by state and national library organizations.

The library director and staff apply practical and acceptable management practices and standards to the daily operations of the library. These practices are clearly defined in a set of policies adopted by the Library Governing Authority, which are made available to the public. Hiring and evaluating a library director is one of the Library Governing Authority's **most important duties**.¹⁶ To prevent all-too-common conflicts resulting from the confusion between governing and managing, a library governing board needs a policy stating that human resource administration—including hiring, supervision, evaluation, and termination of all library staff—is delegated to the library director. The library director provides a regular report as a part of the board meetings to the city, county, or district, which is the legal employer, acting by and through the Library Governing Authority.

The library director is responsible for creating and updating a procedures manual to carry out all policies. The library director manages the library on a daily basis by planning, organizing, and directing services for all people in the community. The library director measures and evaluates the effectiveness of library services in relation to the changing needs of the community. The Library Governing Authority and director seek to serve library users and improve library services through continuous communication with their communities.

¹⁶ <http://www.ColoradoStateLibrary.org/LibraryDevelopment/PublicLibraries/index.htm>

GOVERNANCE CHECKLIST - BASIC

Library Governing Authority:

1. Hires and supervises the library director, according to a written job description, to manage library operations and staff. The Governing Authority, such as a library board, is not involved in the day-to-day operation of the library.
2. Develops performance expectations for the library director for use in annual performance reviews.
3. Enacts policies to ensure that all residents of the library service area have access to tax-supported public library services.
4. Makes board appointments, processes, and terms in compliance with the library's bylaws.
5. Complies with bylaws that outline the board's purpose and operational procedures. Reviews bylaws at least every three years.
6. Convenes regular, open board meetings in compliance with the Colorado Open Meetings ("Sunshine") law, [CRS 24-6-401-402](#). The library director is present at all board meetings. Written minutes are available to the public.
7. Sets goals for the board's continuing education and performance, and annually reviews the board's performance.
8. Approves and reviews policies regularly. When needed, new policies are written, approved, implemented, and made available to the public.

Director:

1. Hires and supervises all library staff.
2. Upholds (with the help of staff) written policies to govern library personnel, operations, fiscal matters, and services (See [checklist of library policies](#)¹⁷ and [policy bank of samples](#).¹⁸)
3. Maintains written emergency procedures and risk management plans.
4. Writes procedures that are regularly reviewed, revised (when appropriate), and made available to staff.
5. Communicates Library Governing Authority priorities to staff and gathers significant staff concerns that may inform governing decisions.
6. Prepares and presents regular reports to the Library Governing Authority.
7. Is a member of Colorado Association of Libraries (CAL), the state's professional organization.

¹⁷http://www.cde.state.co.us/sites/default/files/documents/cdelib/librarydevelopment/publiclibraries/download/pdf/policieschecklist_2012.pdf

¹⁸ <http://www.ColoradoStateLibrary.org/LibraryDevelopment/PublicLibraries/index.htm>

GOVERNANCE CHECKLIST – BASIC (CONT'D)

Board and Director:

1. Orient new library board members.

Orientation can include a tour of the library, review of the trustee manual, bylaws, library policies, library law, public library standards, and pertinent minutes and information on issues currently under consideration.

2. Actively recruit qualified candidates for library board openings with attention to identifying representatives that reflect the demographics of the population served by the library.
3. Meet with elected officials, community leaders, and other stakeholders to inform them about library services and needs.
4. Administer the library in accordance with state and local codes and ordinances, and Colorado Library Law [CRS 24-90-105](#).
5. Comply with federal and state laws that affect library operations, including the American with Disabilities Act, the Fair Labor Standards Act, and the Privacy Law ([CRS 24-90-119](#)).
6. Maintain responsibility and accountability for the library budget, facilities, and strategic plan. The Library Governing Authority assumes ultimate responsibility for library financial accountability.
7. Maintain insurance covering property and liability, including volunteer liability covering errors and omissions.
8. Stay current with library-related issues by way of the State Library, CLiC, the Colorado Association of Libraries (CAL), and the American Library Association (ALA), including United for Libraries. Participate in professional development offered by these organizations.

GOVERNANCE CHECKLIST – FUTURE-FOCUSED

1. (Board and director): Track effectiveness of library services and collections through administration and analysis of surveys and other feedback tools and measures.
2. (Board and director): Actively participate when critical legislative issues arise that affect the future of libraries.
3. (Director and staff) Host advisory groups or special interest groups, such as teen advisory groups, to gain input on collections, spaces, programs, and services for their unique needs.

HUMAN RESOURCES

Outcome

Library leaders will be able to mitigate risk and consistently foster a healthy and effective work environment, ultimately better serving their communities and ensuring a positive patron experience.

Overview

The human resources standard for public libraries includes three elements: general policies needed to handle employment for the library, guidelines concerning staffing, and plans for professional development.

The Library Governing Authority is responsible for policy oversight. The library director is responsible for policy implementation, paying attention to legal issues, professionalism, and employee well-being. A director with a Master's of Library and Information Science (MLIS) degree has completed a program that teaches the skills needed to manage library operations. The board should consider this degree and experience when hiring a director.

As institutions of learning, libraries create a 'culture of learning,' not only for their community, but also for the library staff and trustees.

As institutions of learning, libraries create a "culture of learning," not only for their community but also for the library staff and trustees. Creating a learning culture for all staff and trustees is an ongoing effort. Professional development opportunities for staff are a key part of maintaining this learning culture.

HUMAN RESOURCES CHECKLIST - BASIC

General

1. Follow state and federal laws in recruiting, hiring, and terminating employees.
2. Maintain current staff compensation policies and provide wages and benefits that reflect community and market standards.
3. Use written job descriptions to hire, develop goals, and conduct performance evaluations.

Staffing

1. Employ a library director who, minimally, has a college degree, and preferably a Master's Degree in Library and Information Science or the equivalent.
2. Ensure enough staff to provide quality community and customer (or patron) service.
3. Recruit and select staff to represent community demographics, especially focusing on cultural and multilingual diversity while avoiding discrimination.
4. Schedule paid staff to offer library services to all library patrons during open hours.
5. Create human resource policies or an Employee Handbook for employee orientations. Review for updates at least every two years.
6. Adopt a staffing plan that addresses job descriptions, competencies, organizational development, and succession planning.

Professional Development

1. Ensure all library employees are proficient in carrying out the library's values, philosophy, management, and operational practices.
2. Reimburse staff and board members who attend professional development offerings.
3. Allocate funding for staff development.

HUMAN RESOURCES CHECKLIST – FUTURE-FOCUSED

1. Provide in-house and continuing education activities for staff, trustees, and volunteers.
2. Provide funding and time for staff to participate in ongoing development opportunities during the year, with participation tied to annual plans and review.

MARKETING, COMMUNICATIONS, AND ADVOCACY

Outcome

Community members are aware of the library's activities. They value, actively support, and engage in library initiatives.

Overview

The library board, library director, and library staff communicate, advocate for, and promote the library and its services, utilizing traditional communications methods, as well as the most current and effective ways of reaching target audiences. The library follows a well-planned and executed marketing, communications, and public relations strategy to promote library services, resources, and value regularly to the public.

The overall goal of the marketing, communications, and public relations plan is to inform the public about ways the library meets the fundamental needs of the community.

The mission and vision of the library, as defined in the library's strategic plan, are communicated to stakeholders in ways that illustrate how the library is an essential community service.

The overall goal of the marketing, communications, and public relations plan is to inform the public about ways the library meets the fundamental needs of the community. To this end, the plan includes a strong public image, as well as how library staff will identify, reach, and meet the needs of community members.

Board members and directors play a vital role in lobbying for legislative issues that affect libraries. Knowledge of laws affecting libraries, including limits to lobbying is addressed in the [Fair Campaign Practices Act](#).¹⁹

¹⁹ <http://www.cde.state.co.us/cdelib/fcpalibraries>

MARKETING AND ADVOCACY CHECKLIST - BASIC

1. Be transparent about the library's specific funding sources, including tax revenue, donations and fines, and services that the library provides to foster a better understanding of how public funds benefit the community. Publishing an annual report, monthly updates, and other regular reports can build this public awareness.
2. Develop and implement procedures to receive and promptly respond to comments, suggestions, and feedback from the community in order to increase customer satisfaction and protect and improve the library's image. When possible, refine and improve services based on patron feedback.
3. Communicate a positive image of the library and its services while remaining receptive to diverse opinions and suggestions.
4. Communicate the library's brand, value, and impact in the community in print, the media, and online to actively position the library as an essential service.
5. Maintain a current website with promotional messages, program and resource news, and easy access to the library's print and digital collections.
6. Use social media to promote programs, library resources, and services to increase community engagement with the library.
7. Create a communications procedures and protocols manual to respond to community crises or disasters, including plans with emergency agencies to leverage the library as a communications hub during and immediately after a disaster.

MARKETING AND ADVOCACY CHECKLIST – FUTURE-FOCUSED

1. Develop, adopt, and implement a comprehensive communications, marketing, and public relations plan that addresses and reflects community interests, opportunities, and needs.
2. Allocate funds to support the communications, marketing, and public relations plan. This may include a dedicated budget for advertising (print and digital), promotional materials, support, and staffing for community events, marketing supplies, and, when possible, a communications staff member.
3. Participate in statewide or national campaigns that seek to increase public awareness of libraries.
4. Work with local businesses and organizations to cross-promote services and community benefits.

PLANNING

Outcome

Develop effective and sustainable library operations and tangible community benefits from well-planned library services, technologies and facilities.

Overview

Library planning is a process of imagining the future of the community and the library, and setting a direction for getting there. A formal strategic plan ensures that the library will provide efficient, cohesive, and effective operational results that meet community needs while maintaining fiscal responsibility.

Planning is a continuous process...requiring surveys and analysis of library and societal trends, to determine community needs and current services.

Planning is a continuous process. It requires surveys and analysis of library and societal trends, determining community needs and current services, with qualitative and quantitative measures to conclude if the work is successful. Appropriate time and necessary funds are allocated in the library's budget to implement the planning process.

Input is gathered from all external library stakeholders and the Library Governing Authority, and all levels of staff. This feedback serves as the basis for the vision, mission, and values of the library that guide the development of goals, objectives, and strategies that need to be accomplished. Ultimately, the final plan is communicated to the community and the budget is aligned with the plan. Procedures for measuring the success of the plan are locally determined and executed by staff documentation, community feedback, and governing oversight.

There are many methods to consider in undertaking a strategic plan. Preliminary research is critical to understand what will work best. (See [planning resources](#).²⁰)

²⁰ <http://www.ColoradoStateLibrary.org/LibraryDevelopment/PublicLibraries/index.htm>

PLANNING CHECKLIST - BASIC

1. Use these standards as a guide in the planning process.
2. Establish a vision, mission, and values that are based on a review and assessment of community needs and the unique role of the library in the community served.
3. Review and update the library's strategic plan regularly to determine progress in meeting goals.
4. Implement an ongoing, integrated process of community and library analysis, planning, evaluation, and community impact that covers two to five years, and involves the library board, staff, and community members.
5. Review the library's goals and measurable outcomes regularly to gauge progress, effectiveness, and success.

PLANNING CHECKLIST – FUTURE-FOCUSED

1. Review local, state, and national public library statistics at least annually to evaluate input, output, and outcome measures and to determine the library's success in supporting broad community goals.

RESOURCE SHARING

Outcome

Community members will benefit from greater access to resources through sharing with other libraries and are aware of what the library offers beyond the traditional print collection.

Overview

Colorado has a long and rich history of resource sharing because all libraries are stronger when they work together. Colorado libraries are collaborative in many ways, not just within the public library sphere, but also with school, academic and special libraries, and community organizations.

As libraries encourage patrons to be independent in their library transactions, it is important to consider how to empower them in that process. Libraries that work cooperatively and participate with others in statewide, regional, and consortial programming, share resources locally and strengthen the availability of services for all Coloradans. Besides borrowing materials from others through the state's Interlibrary Loan (ILL) services, it is important to make the library's own materials discoverable to join others as a lender as well.

Libraries that work cooperatively and participate with others in statewide, regional and consortial programming, share resources locally and strengthen the availability of services for all Coloradans.

RESOURCE SHARING CHECKLIST - BASIC

Statewide Resource Sharing

1. Participate in statewide resource sharing programs and services, and actively promote these programs to library users.
2. Contribute resources and/or staff to support statewide resource-sharing programs.
3. Participate in and promote the [Colorado Libraries Collaborate](#).²¹ program, offering reciprocal borrowing to cardholders of other Colorado libraries.
4. Participate in the statewide courier service.
5. Adopt and implement the [Colorado Interlibrary Loan Best Practices](#).²²
6. Use an Interlibrary Loan delivery system for requesting and/or supplying ILL materials.
7. Provide access to databases or electronic collections in compliance with licensing agreements.

RESOURCE SHARING CHECKLIST – FUTURE-FOCUSED

1. Offer patrons the opportunity to initiate ILL requests online.
2. Participate in a shared bibliographic database, when appropriate, regardless of the automation system used.

²¹ <http://www.cde.state.co.us/cdelib/clc/users>

²² <http://www.coloradovirtuallibrary.org/wp-content/uploads/2016/02/colorado-interlibrary-loan-best-practice-revised.pdf>

SERVICES AND PROGRAMMING

Outcome

The community is enriched by programs and services that offer formal, informal, and self-directed learning opportunities for all ages and abilities.

Overview

Library directors have the responsibility to hire well-qualified staff that will provide meaningful services and programs to all members of the community.

Services and programs are offered free of charge to everyone in the library's service area and are accessible by all.

Continuous evaluation is essential to assure that programs and services are effective and accessible, and meet the diverse needs and interests of everyone in the community.

Libraries serve as lifelong learning centers with education as essential part of their mission.

Libraries serve as lifelong learning centers with education an essential part of their mission. In this role, the library actively commits time and resources to coordinate literacy activities at all levels. Family literacy programs, for example, are essential to maintaining or improving student reading skills. Providing resources and services to assist with employment skills, digital inclusion, and economic development is increasingly important. Early literacy, including programs and services for babies, toddlers, and their caregivers, is a unique and vital library offering to the community.

Keeping the library current and relevant to those who use it involves creating platforms for social experiences, offering opportunities for community members to create their own projects, content, and learning experiences. These are all vital aspects of the library's services and programming.

SERVICES AND PROGRAMMING CHECKLIST - BASIC

General

1. Adopt relevant policies that emphasize welcoming and effective services and programs for all segments of the community.
2. Provide basic services free of charge to everyone in the service population as defined by written policies governing lending, borrowing, and circulation.
3. Adopt written policies on the use of public meeting spaces.
4. Assist with or serve as a custodian of local history or community memory.

Services

1. Offer services that meet the needs of the demographics of the community, including special populations, some of which may not use the library.
2. Offer services that include a circulating collection, public technology, programming for all ages, and a community meeting space.
3. Train and develop staff members to offer effective services to the public during all hours the library is open, and in other locations, using competencies developed by library associations and agencies.
4. Offer assistance to the public during all hours the library is open in the use of technology, circulation, and access to materials.
5. Provide reference, reader's advisory, and technology services to all ages.
6. Offer developmentally appropriate collections, programs, and services for babies, toddlers, preschoolers, school-aged children, and teens. Specific guidance and competencies are available [online](#).²³
7. Provide current information to patrons about children's, adult, and/or family literacy programs offered by the library.
8. Provide current information on agencies and organizations with programs of interest to patrons.

Programs

1. Provide interactive, age-appropriate programs for all. Typical programs include:
 - a) Reading programs for all ages, including early literacy and summer learning programs.
 - b) Outreach that integrates the library as a vital part of the community.

²³ <http://www.clel.org>, <http://www.ala.org/alsc>, and <http://www.ala.org/yalsa>

SERVICES AND PROGRAMMING CHECKLIST – BASIC (CONT'D)

- c) Lifelong learning for all community members.
 - d) Literacy programming and/or space or referrals for other agencies to teach literacy classes.
 - e) Resources and services to help with job skills and economic development.
2. Actively involve community leaders in program planning.
 3. Provide inclusive programs and services for community members of all ages, abilities, genders, ethnicities, income levels, etc.
 4. Provide programs at times and locations convenient for the intended audience.
 5. Actively involve community leaders in program planning.
 6. Provide inclusive programs and services for community members of all ages, abilities, genders, ethnicities, income levels, etc.
 7. Provide programs at times and locations convenient for the intended audience.

SERVICES AND PROGRAMMING CHECKLIST – FUTURE-FOCUSED

1. Evaluate all services and programs at regular intervals based on input, output, and outcome measures.
2. Provide library outreach to various populations in locations where they are.
3. Provide a variety of spaces for formal, informal, group, and individual study.
4. Leverage local community members and partners in planning and implementing programs.
5. Offer programs and literature in languages spoken in the community.

TECHNOLOGY

Outcome

Libraries utilize technology to support the missions, visions, and goals of their organizations, resulting in well-informed decisions and efficient, effective library operations and services.

Overview

Technology is an institutional asset, as important to the delivery of patron services as the library building. It serves as a basic part of the infrastructure and is integrated at all levels of the library organization. Technology is a key asset delivering on the library's promise to serve as a community hub, information access point, and cultural center.

Technology is a key asset delivering on the library's promise to serve as community hub, information access point, and cultural center.

Technology is a tool, not a goal. Technologies and systems implemented in libraries should be designed, selected, or implemented to serve the needs of patrons and staff in constructive, effective, innovative, and sustainable ways.

Technology decisions are based on sound research and thoughtful planning. Technology requires investment in qualified staff to support the infrastructure. Technology integrates with and supports all other standards featured in this document, including collections, facilities, finance, planning, resource sharing, and services.

It is important to think of investing in technologies in the same way that a library invests in its physical structures, staff, and collections. A library that fails to sustain a dependable technology infrastructure or does not adapt to evolving technologies will find itself ill-equipped to effectively serve the community or to fulfill the standards identified in this document. Because technology is a necessary part of library operations and is a service to the public, this section is longer and more detailed than previous sections.

TECHNOLOGY CHECKLIST - BASIC

Making Information Readily Available to Public

1. Invest in an integrated library system (ILS) or similar system to support the management and development of the library's collection and allow the public to search the collection.
2. Maintain a website under the control of the library and updated and maintained by library staff, providing access to library and community information, databases, and the online library catalog.
3. Ensure accessibility to a website and technology for the disabled that is consistent with the [Web Accessibility Guidelines](#)²⁴ or for computers used by patrons with visual or other [challenges](#)²⁵.
4. Assess community technology needs annually by gathering feedback from patrons and other community members.
5. Possess up-to-date technology skills and awareness of new technologies that help the library serve its mission.
6. Write a technology plan compatible with achieving the library's mission and goals.
7. Use a reliable authentication or proxy system for public access to subscription materials.
8. Curate links to free online resources to ensure public access to working links of high-quality information.
9. Develop a social networking strategy for internal and external use, and a content strategy for online resources.

Content Creation and Digital Literacy

1. Offer opportunities for the creation of digital content on public access computers by providing equipment such as photocopiers and scanners, productivity, audio/video editing, graphics and development software, and the ability for patrons to save their work.
2. Ensure that library staff is sufficiently trained in the use of the library's technology to do their work efficiently and to assist patrons in use of the machines and programs available to them. (See the Recommended Technology Proficiencies in Appendix A.)
3. Provide regularly scheduled digital literacy training and individual assistance through classes on topics such as basic computer skills, office productivity software, Internet searching, privacy and security, social media, and multimedia.
4. Support use of public technology for workforce development, entrepreneurship, eGovernment⁵, legal purposes, educational opportunities, and health and wellness purposes.

²⁴ <https://www.w3.org/WAI/intro/wcag>

²⁵ <https://www.w3.org/standards/webdesign/accessibility> See also: <https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-section-508-standards/section-508-standards> and <http://www.ala.org/ascla/asclaissues/libraryservices>

TECHNOLOGY CHECKLIST – BASIC (CONT'D)

Connectivity & Security

1. Provide access to current and emerging technology tools and applications, including dedicated wired and wireless Internet connections that support simultaneous use by all computer workstations while running intensive broadband applications; maintain sufficient devices and bandwidth to accommodate user demand. (See Appendix B for a way to estimate bandwidth available per device.)
2. Implement ongoing, adaptive, and overlapping security practices at the device, server, and network levels to ensure the system as well as data storage, transmission, and retrieval are secure. Security practices include a combination of firewalls, access-control lists, intrusion prevention, regular system security updates, and commercial antivirus/anti-malware software packages.
3. Provide, sustain, and refresh technology infrastructure to support library operations and services, with planning to incorporate new technologies in new or remodeled facilities, and ongoing network infrastructure assessments.
4. Develop and enforce technology policies that support library governance policies, operations and services, human resources practices, etc.
5. Ensure that vital data is backed up with adequate frequency, based on the amount and type of data. Backups should be stored on removable media or cloud-based storage, and tested regularly to ensure they function properly for recovery or restoration.
6. Provide the opportunity for all people to participate in digital technology through BYOD (bring your own device) practices.

Future Planning / Evaluation

1. Maintain flexibility in responding to ever-evolving patron technology needs, being aware that as equipment lifecycles shrink it is unwise to overinvest in any single patron technology beyond a three-year lifecycle.
2. Develop a future-minded technology plan that looks forward two years, with feedback from the community about the public's technology needs, and annual reviews.
3. Ensure the plan addresses how technology integrates with and supports library operations, services, programs, collections facilities, and staff. The plan aligns with the library's overall strategic goals and mission.
4. Prepare a disaster-recovery plan associated with technology resources and infrastructure, including functions such as data archiving, recovery testing, and restoration of assets and services.
5. Determine product lifecycles when purchasing new products and budget for repairs and spare parts if the library is able to support any technology beyond its warranty period.

TECHNOLOGY CHECKLIST – FUTURE-FOCUSED

1. Provide accurate and current information to patrons regarding technology services.
2. Provide, sustain, and refresh public-use technologies as detailed in technology plans and annual budgets. This refresh may include, but is not limited to, Internet access stations, photocopiers, audiovisual/media technologies, gaming spaces, electronic classrooms, computer labs, information/learning/knowledge commons spaces, mobile devices (tablets, smartphones), etc.

APPENDIX A

RECOMMENDED TECHNOLOGY PROFICIENCIES

Basic Computer Skills

1. Turn on and shut down the computer
2. Turn the monitor on and off
3. Know basic parts of the computer: monitor, CPU, mouse, keyboard, CD drive, USB port, printer
4. Use the mouse: left-click, right-click, drag and drop
5. Use the keyboard

Operating System

1. Start a program from the Start menu
2. Manage computer settings from the Control Panel
3. Exit a program
4. Save files
5. Change file name or location using Save As
6. Minimize and maximize a window
7. Scroll within a document
8. Manage multiple windows using the taskbar
9. Use menus and toolbars
10. Use the Help feature in programs
11. Find and open files by browsing from within a program
12. Find file icons and open files
13. Drag files to a new location
14. Copy files and paste them into a new location
15. Understand the difference between files and folders
16. Make a new folder
17. Delete a file or a folder

18. Empty the recycle bin and restore files from the recycle bin
19. Use Ctrl-Alt-Delete and the Task Manager to end non-responsive programs
20. Tab between fields
21. Respond to dialog boxes

Troubleshooting

1. Check the various connections in the back of the computer
2. Reboot the computer
3. Use Ctrl-Alt-Delete and the Task Manager to end non-responsive programs

Printers and Printing

1. Turn the printer on and off
2. Load paper
3. Clear a paper jam
4. Replace toner
5. Use print preview
6. Switch between portrait and landscape layouts
7. Print specific pages or selections
8. Print multiple copies

External Storage Devices

1. Know the difference between floppy discs, CDs, and flash drives
2. Insert floppy discs, CDs/DVDs, and flash drives and access the files they contain
3. Copy files to external storage devices
4. "Burn" or copy to a CD or DVE

File Management

1. Understand the differences between files and folders
2. Copy and paste, drag and drop within files and whole files/folders
3. Navigate in the file structure to open, save, or delete files or folders
4. Empty and/or recover files from recycle bin
5. Understand file extensions (.docx, .xls, .pptx)
6. Create files and folders
7. Move files between folders or drives
8. Copy files between folders, to flash drive or other external storage device
9. Delete files and folders
10. Back up files – to a website, a USB device, to CD/DVD, to a network drive
11. Open and save a file
12. Rename a file or folder
13. Create a shortcut to a file, a folder, or a program

Word Processing

1. Insert, edit text
2. Change font and font size
3. Align text: left, right, center
4. Bold, italic, underlined text
5. Change line spacing
6. Change margins
7. Cut, copy, and paste
8. Use spell-check
9. Copy text from the Web into Word and clean it up
10. Use print preview and print selection
11. Understand different word processing file types (i.e. .doc, .docx, .pdf)

Web Browsers

1. Understand what a web browser does
2. Understand what a URL or web address is
3. Understand the difference between a search box and the address bar
4. Find and open Internet Explorer and Firefox
5. Type in a web address
6. Navigate using links
7. Use Back, Forward, Home buttons
8. Fill out an online form
9. View the browsing history
10. Delete history and temporary files
11. Add, delete, and organize bookmarks or favorites
12. Use a search engine
13. Print all or part of a web page
14. Use the Find command
15. Change the text size
16. Download a file from the Internet

Email

1. Access email by typing in web address
2. Log into account
3. Read, archive, and delete messages
4. Send messages to one recipient or to multiple recipients
5. Reply to and forward messages
6. Print messages
7. Open and download attachments
8. Send attachments
9. Understand basic email etiquette

Electronic Reading Devices

1. Download e-book content
2. Connect device and transfer content
3. Understand e-book file types and compatible devices

Cameras and Images

1. Take digital pictures
2. Connect camera and transfer photos to computer
3. Upload photos to email, photo-sharing websites, Facebook, etc.
4. Manage and organize photos on computer
5. Edit photos in photo-editing software (i.e. Picasa, Microsoft Picture Manager)

Social Networking

1. Be familiar with social networking tools (i.e. Facebook, Twitter, YouTube, Pinterest, Instagram, etc.)

2. Understand privacy issues
3. Edit options and settings
4. Upload content such as photos and videos

Digital Music

1. Download music
2. Understand file types (wma, mp3)
3. Manage and organize music
4. Understand file sharing and copyright infringement issues

APPENDIX B

ESTIMATING BANDWIDTH AVAILABLE PER DEVICE

Bandwidth is part of the essential infrastructure of the Library. The minimum recommended bandwidth per Internet device is 1.5 Mbps.

To calculate the minimum bandwidth you will need, use the formula as follows:

$$(\# \text{ of devices} \times 1.3) \times 1.5 \text{ Mbps} = \text{Minimum Bandwidth Needed}$$

To find “# of devices” for the formula, count the total number of computers, laptops, tablets and other internet capable devices provided by the library.

In the formula, the number of devices is multiplied by 1.3 to take into account the one personal device using wireless user per three public computer users.

# of patron Internet computers	# of patron wireless devices	Total # of patron devices	Broadband speed for patron network	Patron broadband speed divided by Total # of patron devices
# of staff computers		Total # of staff devices	Broadband speed for staff network	Staff broadband speed divided by Total # of staff devices

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