



# NEW TRUSTEE ORIENTATION

## Introduction

- Get Up to Speed Quickly!
- 2025-2026 Calendar

## WVLS At a Glance

- [Map of Public Library Systems in Wisconsin](#)
- [WVLS Mission and Purpose](#)
- [WVLS Constitution](#)
- [WVLS Fact Sheet; 2024](#)
- [WVLS Organizational Chart; 2024](#)
- [WVLS Board of Trustees By-Laws](#)
- [WVLS Board of Trustees; 2024](#)
- [WVLS Leadership; 2024](#)
- [WVLS - Meet the 2024 Team](#)
- [LEAN WI Stack Information – Will share via email.](#)
- [Partners for Excellence](#)

## WVLS Governance

### WVLS Board of Trustees

- [WVLS Library Advisory Committee \(LAC\)](#)
- [WVLS V-Cat Steering Committee](#)

### V-Cat Consortium

- [V-Cat Bibliographic / Interface Committee](#)
- [V-Cat Cooperative Circulation Committee](#)
- [V-Cat ILS Evaluation and Review Committee](#)

## WVLS Planning Documents

- [WVLS 2025 System Plan](#)
- [WVLS \(LEAN WI\) Technology Plan; 2025-2029](#)
- [V-Cat Strategic Plan; 2021-2023](#)

## WVLS Policies

- [WVLS Disaster Plan](#)

- [WVLS Employee Handbook](#)
- [WVLS Travel Reimbursement Policy](#)
- [WVLS Reserve Fund Policy](#)
- [WVLS Record Retention Schedule](#)
- [WVLS Patron Privacy Policy](#)
- [WVLS Social Media Policy](#)
- [WVLS Collection Development Plan](#)
- [WVLS Conflict of Interest Policy - Disclosure Form](#)

## WVLS Financial Information

### Documents Approved by the WVLS Board of Trustees

- [WVLS Budget; 2025 \(including V-Cat and LEAN WI Budgets\)](#)
- [WVLS Updated Budget; 2025 \(Updated in March 2025\)](#)
- [WVLS Bills for Approval](#)
- [WVLS Schedule of Receipts](#)
- [WVLS Budget Reports \(WVLS, V-Cat, LEAN WI\)](#)
- [General Ledger Summary](#)
- [Treasurer's Report](#)
- [WVLS Audit](#)

### Service Fees Approved by WVLS Board of Trustees

- [WVLS V-Cat Budget and Digital Buying Pool Shares; 2025](#)
- [WVLS Technology Planning Guide: 2025](#)

### Pass Through Fees

- [Patron Cards and Item Barcodes](#)
- [Movie Licenses](#)
- [Supplies](#)
- [Delivery Stops](#)
- [Equipment/Computer Procurement](#)

### Grants Approved by WVLS Board of Trustees

- [WVLS Summer Library Program Performer Grant](#)
- [WVLS Conference Scholarship](#)
- [WVLS WLA Library Legislative Day Grant](#)
- [WVLS Innovation and Collaboration Grant](#)
- [Federal LSTA Grant through IMLS Grants to States Program](#)

## Information for Trustees from WI Dept. of Public Instruction

- [Administrative Essentials: A Handbook for Wisconsin Public Library Directors](#)
- [Trustee Essentials: A Handbook for Wisconsin Public Library Trustees](#)
- [Trustee Essentials 1 - Trustee Job Description](#) – Will share via email.

- [Trustee Information Page; WI Dept. of Public Instruction](#)

## Legal Information

### Public Libraries and Systems

- [Chapter 43; Wisconsin State Statutes](#)
- [Wisconsin Administrative Code - Chapter PI 6](#)
- [Wisconsin State Budget Process](#)
- [How a Bill Becomes Law - Wisconsin State Legislature](#)
- [Wisconsin Libraries and Legislators; 2024-2025 – Will share via email.](#)

### Wisconsin Open Meetings Law Compliance Guide May 2024

- [Wisconsin Open Meetings Law – Summary – Will share via email.](#)
- [Open Government Law and Compliance Guides](#)
- [Wisconsin Legislator Briefing Book - Chapter 5 - Open Meetings Law; 2018](#)
- [The Library Board and the Open Meetings Law; Trustee Essentials; Chapter 14](#)

### Wisconsin Public Records Law Compliance Guide May 2024

- [Records Retention for Wisconsin Public Libraries and Library Systems](#)
- [Public Library Records Retention Basics; 2021](#)
- [General Records Schedule GRS for Public Libraries and Public Library Systems June 2017 to June 2027](#)

### Americans with Disabilities Act

- [An Overview of the Americans with Disabilities Act; 2017](#)
- ["Make Your Library ADA Friendly, Not Just ADA Compliant;" 2021](#)
- [Library Service to Persons with Disabilities](#)
- [Prioritizing Accessibility and Disability Inclusion at Your Library \(webjunction.org\)](#)
- [12 Basic Requirements for ADA Compliance at the Library](#)

## Library Agreements/County Library Plan

- [WVLS Member Library Participation Agreement 2013](#)
- [WVLS Member County Participation Agreement 2013](#)
- [Current County Library Plan](#)

## County Funding for Library Services

- [County Funding for Nonresident Use](#)
- [County Reimbursement Information](#)
  - County Funding of Public Libraries – Act 150, Act 420, Act 157
  - County Payments for Library Services Handout
  - Email to Directors with County Funding Information
  - Cost Per Circulation Statistics
  - Worksheet – WVLS Member Libraries – Reimbursements from Home and

Adjacent Counties  
Best Practices for Libraries That Bill for Cross-County Use (SRLAAW)  
Best Practices – Card Expiration and Renewal (V-Cat)

- [Public Library PCode 4 Spreadsheets; 2023](#)

## Library Annual Report and Compliance

- Copies of Public Library Annual Report for Libraries in County Represented by WVLS Trustee – Will share via email.
- Public Library Assurance of Compliance with System Membership Requirements; Public Library Annual Report; Page 10
- Statement Concerning Public Library System Effectiveness; Page 11

## Information for Trustees/Library Boards

- Effective Board Meetings and Trustee Participation; Trustee Essentials; Chapter 4
- [Robert's Rules of Order](#)
- [How to Take Minutes at a Board Meeting](#)
- A Library Board's Practical Guide to Self-Evaluation; 2008 – Will share via email.
- [For Library Trustees – WI Dept. of Public Instruction](#)
- [Library Trustee 101](#)
- [Wisconsin Trustee Essentials - Videos](#)
- [Trustee Tale – OWLS](#)
- Developing Essential Library Policies; Trustee Essentials; Chapter 10
- [Materials Challenges & Intellectual Freedom](#)
  - Freedom of Expression and Inquiry; Trustee Essentials; Chapter 22
  - [Library Bill of Rights](#)
  - [Freedom to Read Statement](#)
  - Dealing with Challenges to Materials and Policies; Trustee Essentials; Chapter 23
  - [United Against Book Bans](#)

## Library Related Agencies, Associations and Councils

### **American Library Association (ALA)**

- [Public Library Association \(PLA\)](#)
- [United for Libraries: Association for Library Trustees, Advocates, Friends and Foundations \(United for Libraries\)](#)

### **Wisconsin Library Association (WLA); membership provided by WVLS**

- [Wisconsin Association of Public Libraries \(WAPL\)](#)
- [Wisconsin Library Trustees and Friends \(WLTF\)](#)

### **Wisconsin Public Library Consortium (WPLC)**

- [Wisconsin's Digital Library](#)

- [WPLC Donations](#)

## **Other**

- [Association for Rural and Small Libraries \(ARSL\)](#)
- [Council on Library and Network Development \(COLAND\)](#)
- [Cooperative Children's Book Center \(CCBC\)](#)

## **Miscellaneous**

### **WVLS Information**

- [WVLS Annual Report; 2023](#)
- [System Information and Public Library Statistics: 2023](#)
- [WVLS Glossary of Acronyms & Library/System Related Terms; 2024](#)

### **Additional Resources for Libraries**

- **State**
  - [Interlibrary Loan and WISCAT](#)
  - [Recollection Wisconsin](#)
  - [Badgerlink: Wisconsin's Online Library](#)
- **WVLS**
  - [Makerspace, Programming and Memory Kits](#)
  - [Collections and Databases](#)

### **Board Self-Evaluation**

- [The Four Ws \(and a H\) of Board Self-Assessment](#)
- [Board Self-Evaluation Questionnaire](#)
- [Library Trustee Self-Evaluation](#)
- [Library Board Effectiveness](#)
- [Six Signs It's Time to Assess Your Board's Performance](#)
- [Library Trustee Self-Assessment](#)
- [Rhineland District Library Board of Trustees Self-Evaluation](#)

## **Other**

- [Portrait of a Legislative Success – Will share via email.](#)
- [The Role of Library Trustees \(United for Libraries\) – Will share via email.](#)
- [Twelve Golden Rules for Board Members - United for Libraries](#)
- [Wisconsin Public Library Standards; 6th Edition; 2018](#)
- [WI Public Library Standards, 6th Edition Checklist](#)

*Updated December 23, 2024*