Competency Index for the Library Field

Compiled by WebJunction

Competency Index for the Library Field

Compiled by WebJunction

Updated February 2014

Competency Index for the Library Field

Compiled by WebJunction

Updated February 2014

Editors

Betha Gutsche

Brenda Hough

Acknowledgments

The competencies for the *Competency Index* were compiled from input from a spectrum of library practitioners and leaders, and from competencies defined by other library organizations.

Competency sets

- ALA Competencies for Librarians Serving Children in Public Libraries
- ALA Competencies for Librarians Serving Young Adults
- ALA Library Support Staff Certification Program Competencies
- ALA Professional Competencies for Reference and Information Services Librarians
- California Library Association Competencies for California Librarians in the 21st Century and Technology Competencies for California Library Workers
- Colorado Virtual Library Technology Trainer Competencies
- Ephrata Public Library (PA) Staff Competencies
- Kansas Library Association Core Competencies for Public Library Directors and Technology Core Competencies
- NASIG Core Competencies for Electronic Resources Librarians
- New Jersey Library Association Competencies for Library Administrators, Core and Technical Competencies for Librarians and Reference and Information Services Competencies
- North Carolina Libraries Competencies in Technology for Libraries
- Ohio Library Council Public Library Core Competencies
- Public Library of Charlotte & Mecklenburg County Information Technology Core Competencies
- Special Library Association Competencies for Information Professionals in the 21st Century
- WebJunction Sustaining Public Access Computing Programs: Technology and Management Competencies

Other Resources

- Edge Initiative Assessment
  http://www.libraryedge.org
- Institute of Museum and Library Services 21st Century Skills
  http://www.imls.gov/about/21st_century_skills_list.aspx
- Maine State Library's Map of ALA Core Competencies to 21st Century Skills
  http://www.maine.gov/msl/libs/ce/compmap.htm
- Murphy, Joseph, and Heather L. Moulaison, "Social Networking Literacy Competencies for Librarians." ACRL National Conference presentation, March 14, 2009.
  http://www.flickr.com/photos/joeydigits/3357643763/in/set-72157615332049180/
- Thompson, Susan M., editor. *Core Technology Competencies for Librarians and Library Staff*, a LITA Guide. Neal-Schumann Publishers, Inc., New York, London, 2009.

Subject Matter Expert Reviewers

- Liz Bishoff, Director, Digital and Preservation Services, BCR (Bibliographical Center for Research), Aurora, Colorado (1st edition)
- Mary Bushing, Consultant and Library Educator, Great Falls, Montana (1st edition)
- Angela Campbell, Public Relations & Programming Coordinator, Davenport Public Library, Iowa (1st edition)
- Bill Cochran, Director, Parmly-Billings Public Library, Billings, Montana (1st edition)
- Jake Eubanks, Reference Librarian, Johnson County Library System, Johnson County, Kansas (2nd edition)
- Sarah Evans, Library Teacher, Meany Middle School, Seattle, Washington (1st edition)
- Abigail Goben, Librarian, La Crosse Public Library, Wisconsin (1st edition)
- Jeanne Goodrich, Trainer for PLA CPLA program, Portland, Oregon (1st edition)
- Sara Groves, Marketing and Communications Coordinator, Montana State Library (1st edition)
- Matt Gullet, (former) Emerging Technology Manager, Public Library of Charlotte & Mecklenburg County, North Carolina (1st edition)
- Rachel Smalter Hall, Web Development Librarian, Johnson County Library System, Johnson County, Kansas (2nd edition)

Acknowledgments

- Cynthia Harrison, Director, Anacortes Public Library, Washington (1st edition)
- Robin Hastings, Technology Consultant, Northeast Kansas Library System, Lawrence, Kansas (2nd edition)
- Gretchen Hoffman, Professor, Texas Woman's University, Denton, Texas (2nd edition)
- Sarah Houghton-Jan, Digital Futures Manager, San José Public Library, California (1st edition)
- Erin Downey Howerton, Librarian, Wichita Public Library, Wichita, Kansas (2nd edition)
- Geri Ingram, OCLC Digital Collection Services Manager, San Diego, California (2nd edition)
- Mick Jacobsen, Librarian, Skokie Public Library, Skokie, Illinois (2nd edition)
- Julia Lanham, Human Resources, Public Library of Charlotte & Mecklenburg County, North Carolina (1st edition)
- Douglas Lord, Head of Circulation, New Britain Public Library, New Britain, Connecticut (1st & 2nd editions)
- Renée McGrath, Director, North Valley Library, Stevensville, Montana (1st edition)
- Ingrid Mifflin, Systems Librarian, Washington State University, Pullman, Washington (1st edition)
- Bruce Newell, retired from Montana State Library (1st edition)
- Rebecca Richardson, Electronic Resources Librarian, Purdue University, West Lafayette, Indiana (2nd edition)
- Christian Sarason, OCLC Digital Collection Services Product Manager, Seattle, Washington (2nd edition)
- Crystal Schimpf, Program Manager, Community Technology Network, San Francisco, California (2nd edition)
- Debra Shapiro, University of Wisconsin–Madison SLIS, Wisconsin (1st edition)
- Cal Shepherd, Manager of Consortial Outreach, SOLINET (LYRASIS), Atlanta, Georgia (1st edition)
- Diana Shonrock, Sci/Tech Librarian, Iowa State University, Ames, Iowa (1st edition)
- Karen Starr, Assistant Administrator, Library and Archive Development, Nevada State Library and Archives, Nevada (1st edition)
- Karen Strege, Library Consultant, Seattle, Washington (1st edition)
- Cheryl Turner, Librarian, Gwinnett Public Library, Gwinnett County, Georgia (2nd edition)
- Pat Wagner, Consultant, Siera Learn, Denver, Colorado (2nd edition)
- Tyler O. Walters, Associate Director, Technology and Resource Services Library and Information Center, Georgia Institute of Technology, Atlanta, Georgia (1st edition)
- Diana Weaver, Director, Basehor Community Library, Basehor, Kansas (2nd edition)

- Tom Wilson, Associate Dean for Library Technology, University of Alabama, Tuscaloosa, Alabama (1st edition)
- David Wright, Readers Services, Seattle Public Library, Seattle, Washington (2nd edition)
- Neal Wyatt, Collection Management Senior Librarian, Chesterfield County Public Library, Virginia (1st edition)

Grant Support

INSTITUTE *of*
Museumand**Library**
SERVICES

Contents

Introduction

The *WebJunction Competency Index* has been a valuable resource for libraries since its introduction in 2009, helping staff identify and obtain the knowledge, skills and support needed to power relevant and vibrant libraries. However, with ever-increasing economic, social and educational demands, libraries have experienced dramatic changes in community needs and the tools available to serve those needs. Community members have grown to expect personalized experiences, and they want services and resources that are easy to access and simple to share and build upon. They expect higher levels of interactivity and accountability. Accordingly, the 2009 *Competency Index* has been updated to address the range of skills and abilities required to meet evolving community needs and expectations.

To update the *Index*, the original competency sections were revisited and revised, informed by review of recent competency sets from various library organizations and by input from subject matter experts across the field. Three elements in particular have been emphasized throughout: 21st century skills, accountability and community engagement.

21st Century Skills

One of the critical new directions emphasized in the updated *Competency Index* is the need to foster 21st century skills in our communities. In order to do this, library staff must be equipped with the right skill sets themselves. The competencies have been edited in many places to reflect increased emphasis on communication, collaboration, critical thinking and creativity. Technology is ubiquitous. Self-directed learning and innovation are highlighted throughout. The updated *Index* opens with the Essential Library Competencies section, which combines the core technology competencies with the personal/interpersonal competencies to emphasize the body of skills and knowledge that are fundamental for everyone who works in a library in any position.

Accountability

Libraries are experiencing an increased need to measure and demonstrate impact. The *Competency Index* updates reflect the heightened expectations of accountability, with statements about ongoing data collection and evaluation.

Community Engagement

Libraries have long been committed to building healthy, thriving communities, but they are now seeing an increased need to create and build strategic partnerships and expand relationships with the larger community. Community engagement has been emphasized in many sections of the updated *Competency Index*, from building awareness of current needs and identifying resources, to continuously focusing and prioritizing efforts according to changing needs.

With purposeful staff development, libraries can embrace opportunities, build on past successes and proceed in promising new directions. The updated *Competency Index* is intended to support staff in discovering and enhancing the skills that are most important for them in serving communities effectively.

Essential Library Competencies

These competencies are the underpinning of all of the other sections of the Competency Index. Core technology skills and strong interpersonal skills are fundamental for everyone who works in a library in any position. Librarians and library staff who possess all of these qualities will build a vibrant and relevant library.

Core Technology Competencies

Now that technology has permeated all levels of the library's operations and services, every position requires some level of comfort with computers. This section defines core technology competencies that all staff need in order to contribute to the overall effectiveness of the organization. Success in this area, however, depends less upon what you know right now and more upon ongoing learning.

(Note: Beyond the core, each position in the library requires varying levels of technology skill, depending on which tasks need to be accomplished. See the Systems & IT category for comprehensive technology competencies.)

Core E-mail

Performs basic functions of e-mail applications

- Receives, opens, forwards as needed or deletes e-mail messages
- Composes or replies to, addresses and sends e-mail messages
- Sends, receives and saves attachments
- Manages addresses/contacts
- Creates folders and files messages for retrieval as needed
- Identifies and uses Web-based e-mail programs as well as desktop e-mail applications

Performs basic calendar operations and task management

- Creates, accepts and sets recurring appointments
- Sets reminders for calendar items
- Plans and schedules meetings and invites attendees
- Creates and manages task lists

Core Hardware

Understands, uses and helps others use basic computer hardware and peripherals

- Understands basic technology terminology
- Recognizes and understands the functions of basic computer components (computer, monitor, keyboard, mouse, power supply, printer)
- Performs basic operations on computer hardware (plug in, start-up, shut-down, reboot, mouse functions, keyboard functions, uses headphones and speakers)
- Recognizes common removable storage devices (CD or DVD disks, USB drives, floppy disks) and identifies the appropriate drives
- Performs basic troubleshooting procedures for computer hardware and peripherals
- Understands the set-up and use of data projectors and other audio-visual equipment used for library programming
- Performs basic printer maintenance tasks (start-up, load paper and cartridges, clear paper jam)
- Demonstrates familiarity with the library's assistive and adaptive technology and helps others learn to use it
- Demonstrates familiarity with library scanners and helps others use them

Understands, uses and helps others use mobile devices

- Demonstrates familiarity with the use of e-reader devices and downloading of e-books
- Demonstrates familiarity with other mobile devices in use in the library, including tablets and smartphones
- Assists patrons to find answers to their questions about device usage
- Assists patrons who want to print from their own devices to the library's wireless-enabled printers

Core Internet

Understands, uses and helps others use the Internet

- Understands the basic structure of the Internet and of the World Wide Web (websites and Web pages)
- Identifies and uses common browsers for accessing the Web; understands and uses URLs
- Uses common functions of Web browsers (navigation buttons, scroll, add "bookmarks" or "favorites," print)
- Downloads and saves files from the Internet, including image, audio and video
- Demonstrates familiarity with Web-based applications (in the "cloud") versus desktop applications
- Downloads e-books and audiobooks

Demonstrates information literacy

- Identifies and uses search engines, Web directories and online databases
- Evaluates information critically
- Demonstrates familiarity with a variety of search strategies (keyword, Boolean operators)
- Identifies and helps others appropriately use the library's online resources including the online catalog, databases, social media accounts, etc.

Understands common security protocols related to Internet use

- Understands the purpose of anti-virus and anti-spam software
- Identifies pop-up windows and blocks or allows them as necessary
- Understands the function of cookies
- Recognizes secure transaction sites and understands what type of activities are conducted there
- Understands and applies the library's computer and Internet usage policies (CIPA, privacy, security)

Core Operating Systems

Understands and performs basic operating system functions

- Performs basic operating system functions (logs on/logs off, launches programs from the desktop or menu, uses multiple open windows, deletes files)
- Performs common file and folder management tasks and recognizes common file extensions
- Performs basic computer maintenance tasks (e.g., empties "trash" or "recycle bin," restores files from trash, runs virus checks)

Core Software Applications

Understands and performs basic functions and tasks of common software programs

- Identifies different types and uses of common software applications
- Performs the manipulations common to most applications (open/close, maximize, scroll, print, etc.)
- Understands and uses the features common to most applications (menus, toolbars, taskbar, Help menu, etc.)
- Performs basic procedures to address software application problems
- Demonstrates familiarity with tools and methods for making technology more accessible for users with disabilities

Performs basic word processing operations

- Creates, opens and saves or deletes files
- Selects, cuts, copies, pastes or deletes text
- Performs operations to structure, format and spell-check documents

Performs basic printing operations from common applications

- Identifies printers available for a given workstation
- Identifies local versus networked printers
- Adjusts the set-up, previews print jobs and performs print operations

Core Web Technologies

Maintains awareness of commonly used technologies and applies technology effectively for ongoing learning and collaboration

- Uses technology as a tool to research, organize, evaluate and communicate information
- Uses digital devices, communication tools and social networks to access, evaluate and create information
- Uses technology to share information, communicate and collaborate with others
- Uses Web conferencing programs for synchronous, online meetings or learning
- Identifies and uses help menus, tutorials and support communities to acquire the necessary skills
- Locates and follows information sources to stay informed of new technologies and social tools

Personal/Interpersonal Competencies

In most situations in life, your effectiveness is enhanced by clear communication, strong relationships, ethical behavior and the flexibility to be a leader, team player and lifelong learner.

Collaboration

Unless you work alone in a cave, you must interact productively with others in order to accomplish your own and your organization's goals. Master your interpersonal relationships and you have a recipe for success.

Develops and maintains effective relationships with others to achieve common goals

- Treats everyone with honesty, respect and fairness to build an environment of trust
- Contributes to a collaborative, committed and collegial work environment
- Pursues an understanding and embrace of individual and organizational diversity
- Acknowledges own strengths and contributions, and recognizes the complementary strengths and contributions of others
- Shares knowledge gained through professional discussions, conferences, formal courses and informal channels with colleagues
- Gives and receives constructive feedback from coworkers, supervisors and users

Works effectively in teams with strong team-building skills and attitudes

- Contributes constructively to the achievement of the team's goals and objectives
- Assumes shared responsibility for collaborative work, and values the individual contributions made by each team member
- Contributes to a problem-solving environment and works toward mutually acceptable solutions, regardless of position or level
- Participates actively in information-gathering and decision-making in order to promote the best interests of the team
- Manages own and others' time effectively to deliver work on time
- Finds opportunities to help others to develop new ideas and achieve their full potential
- Gives or receives coaching or mentoring from team members as appropriate

Applies effective strategies to manage organizational politics, conflict and difficult coworker behaviors

- Understands that organizations are inherently political (including libraries) and develops strategies to become an effective player
- Understands a variety of difficult behavior patterns and develops responses appropriate to each
- Routinely examines own behavior, accepts accountability for own actions and adjusts appropriately
- Understands and applies strategies for conflict resolution

Customer Service

The delivery of excellent customer service is a fundamental factor in effectiveness and needs to be prioritized throughout the organization. Interactions with users require trust, respect and focus on the needs of the individual. It is necessary to deliver quality customer service to virtual users as well as to users within the building.

Manages the library environment to enhance the user experience

- Organizes the library's collections and work areas to appeal to users and to meet their needs
- Organizes physical elements in the library to create a positive and welcoming environment
- Addresses the physical or mental barriers that could prevent people from using the library
- Provides quality customer service to virtual users as well as to users in the building, ensuring that customer service principles are applied to online interactions

Develops and evaluates standards and practices for the delivery of quality customer service

- Creates a customer service plan
- Anticipates and maintains awareness of users' needs and wants through customer service surveys, complaint logs and other means
- Analyzes input from users, evaluates the effectiveness of current services, and adjusts services and practices as applicable
- Uses effective training strategies to teach staff good customer service techniques
- Determines the relative needs of users, suppliers and library staff, and strives for balance in supporting them to achieve their goals

Applies customer service skills to enhance the level of user satisfaction

- Treats users in a welcoming, professional manner and provides other staff with an example of positive customer service
- Listens effectively to determine and address needs of the individual
- Acts as a goodwill ambassador for the library, promoting the library's values and services in all user interactions
- Demonstrates thorough knowledge of all aspects of the organization that impact users (mission and vision, policies and procedures, collections and services, and system-wide strategies)
- Recognizes, honors and responds appropriately to diversity and cultural differences

Applies effective techniques to address difficult situations with users

- Encourages users to follow library policies; applies good judgment when deviating from official policies and procedures
- Deals with users' concerns efficiently and effectively
- Maintains a calm, professional manner in difficult situations and applies effective communication techniques
- Responds to complaints and problems shared online in a prompt and professional manner

Ethics and Values

The library plays an important role in people's lives and in their communities, and therefore, it is important for library employees to understand this social responsibility. It is important for individuals to reflect and develop self-awareness about the values and ethics that guide their practice.

Understands and acts in accordance with the basic values and ethics of library service

- Understands the history of libraries and their role in society, both in general and in the particular community
- Understands and adheres to the mission, values and vision of the library organization
- Understands relationship between laws and ethics and applies relevant state and federal laws
- Demonstrates familiarity with the Library Bill of Rights and the ALA Code of Ethics, and articulates the relevance to library service
- Applies a fundamental understanding of the ethical/legal issues surrounding the access and use of information technologies
- Understands privacy issues and protects user confidentiality

- Understands and promotes intellectual freedom and freedom of information
- Provides equitable services to all users
- Recognizes, respects and addresses the diverse nature of the library's users and community
- Applies a fundamental understanding of the ethical/legal issues surrounding the access and use of information technologies

Leadership

It is not necessary to have "manager" or "director" in your title in order to be a leader. There are both small and large opportunities to demonstrate leadership at any level. Solid project management skills, alignment with organizational vision and goals, and being responsible to others are all components of being a leader.

Aligns efforts with the vision and direction of the organization

- Demonstrates alignment with the library's vision, works to achieve it and inspires others to do the same
- Identifies the appropriate opportunities, resources and timing to act in support of the library's vision and mission
- Works to meet or exceed goals by obtaining resources and support, and by eliminating obstacles

Demonstrates leadership qualities and behavior

- Actively pursues and accepts leadership roles and demonstrates ability to lead teams effectively
- Uses interpersonal and problem-solving skills to influence and guide others toward a goal
- Leverages strengths of others to accomplish a common goal
- Fosters an environment based on integrity and high ethical standards
- Acts responsibly with the interests of the larger community in mind
- Empowers others to take ownership in decision-making and problem-solving
- Inspires others to be their best
- Takes initiative, seeks new opportunities and challenges, and applies creative and innovative thinking
- Maintains a positive attitude and sets an example for others to follow, no matter what position is held in the library
- Researches trends in leadership skills and styles and applies new knowledge effectively

Employs sound project management principles and procedures in the planning and implementation of programs and services

(See also: Library Management > Project Management)

- Understands the basic principles and procedures of project management and the importance of applying them
- Sets and meets goals, even in the face of obstacles and competing pressures
- Defines outcomes and expectations based on user requirements and needs
- Develops support for projects that implement library goals and objectives
- Uses resources efficiently, prioritizes workflows and manages effectively within budget limits
- Demonstrates attention to detail
- Establishes processes for evaluating the effectiveness of the project and implementing improvements as appropriate
- Understands and fulfills legal or project requirements for compliance, recordkeeping and reporting

Anticipates and adapts to change and challenges effectively

- Embraces and adapts to change with curiosity and enthusiasm
- Adapts to varied roles, job responsibilities, schedules and contexts
- Works effectively in a climate of ambiguity and changing priorities
- Maintains a positive attitude in the face of challenges and unanticipated changes
- Anticipates future trends and recommends changes in priority or direction in alignment with organizational goals
- Explores and adopts new technologies for their potential to deliver new ideas, products and services
- Recommends and takes reasonable risks to test implementations of change

Learning and Innovation

Change is the only constant and continuous learning is at the center of library culture. Remaining relevant and central to our communities requires innovation. Innovation is inherently a learning process. Individuals who thrive in this environment embrace ongoing change and are focused not only on the present, but also on the future.

Manages the development of one's own learning and ongoing improvement of skills and knowledge

- Demonstrates commitment to learning as a lifelong process
- Understands the importance of lifelong learning for all levels of library work and actively pursues personal and professional growth through continuing education
- Formulates personal career goals, identifies learning needs and creates a learning plan to achieve them
- Takes personal responsibility for learning, shows initiative and is self-directed
- Recognizes the value of professional networking and actively participates in professional associations
- Understands and uses resources and strategies for keeping up with new ideas and technologies
- Seeks opportunities to apply new knowledge and to share best practices, research and experiences with colleagues
- Supports self and others in pursuit of a balanced lifestyle
- Seeks exposure to new ideas, both within and beyond the library field, and stretches beyond one's comfort zone
- Pursues learning in multiple formats (including online) and practices self-directed learning

Demonstrates critical thinking and problem-solving abilities

- Reasons effectively
- Hones critical thinking skills
- Uses systems thinking, analyzing how parts of a whole interact with each other to produce overall outcomes in complex systems
- Synthesizes information, makes connections between multiple concepts and deduces effective arguments
- Reflects critically on learning experiences and processes
- Solves problems in both conventional and innovative ways
- Asks questions that clarify different points of view

Uses creative and innovative approaches

- Uses a wide variety of idea creation techniques, such as brainstorming

- Demonstrates imagination and curiosity

- Works creatively with others, staying open to diverse ideas and perspectives

- Incorporates group input and feedback into work

- Demonstrates ability to move from idea to implementation to put innovation into action

- Views failure as an opportunity to learn

- Acts on creative ideas to make useful contributions to the library, the community and/or the field

Library Collection Competencies

Library collections exist to meet the diverse lifelong learning needs of their users and communities. Laws and policies guide practice. Efficient workflows and practices help provide organized and expedient access to users.

Acquisition and Processing

After materials are selected, they are acquired and processed. The goal is to provide responsive and proactive service to users through timely and efficient processing.

Manages the processes by which library materials are ordered, received and tracked

- Establishes procedures for ordering and handling all library resources for expedient availability to library users
- Establishes appropriate and consistent procedures for the physical processing of library materials; understands the marketing value of proper preparation of library materials
- Understands how publishers, vendors and other sources involved in the purchasing process affect the quality, costs and efficiencies of the end result
- Develops strategies for keeping up with changes in publishers, vendors and other sources for purchasing library materials
- Establishes procedures for acquiring a variety of materials (serials, periodicals, audiovisual materials, electronic media, government documents, gift materials and other formats)
- Determines the most efficient, cost-effective and customer-centered means to acquire requested materials
- Identifies and implements new technologies in processing
- Establishes procedures for tracking materials and for negotiating resolutions for returns, incorrect orders, items not received and price discrepancies

Manages the expenditures and accounting for acquisitions

- Manages the allocation of the materials budget and negotiates the purchase and licensing of materials
- Maintains accurate budgets and accounts, including encumbered funds as well as expended funds
- Demonstrates proficiency with software programs appropriate for managing acquisitions accounts
- Leverages partnerships with other libraries or organizations for discounted or cooperative purchasing options

Cataloging

The efforts of catalogers enable users to locate what they need in the library collections. As the world of information evolved from physical materials occupying physical places to digital resources in a multiplicity of formats, catalogers have adapted with richer metadata sets, linking repositories and institutions, and delivering resources in-person and remotely.

Catalogs all types of library materials according to relevant bibliographic control standards

- Understands the general structure, relationships and importance of library catalog systems and software.
- Applies appropriate bibliographic control standards to organize library materials and resources (e.g., RDA, MARC, Dewey Decimal Classification, Library of Congress Classification, Library of Congress Subject Headings, Dublin Core, etc.)
- Understands and uses the cataloging functions of integrated library systems
- Understands and performs copy or original cataloging as needed, providing descriptive cataloging, classification and subject analysis appropriate to the content
- Maintains authority control and provides appropriate references in the library's catalog
- Applies in-depth knowledge of cataloging standards to assess bibliographic records for accuracy and completeness
- Selects appropriate subject headings and call numbers for accurate identification and placement within the collection; understands the broader context (national and international) in which collections function
- Uses cataloging tools and services available from bibliographic utilities; assesses and learns new tools promoted by bibliographic utilities

Manages the catalog to ensure that library users have optimal access to the collection

- Updates the catalog to reflect accurate bibliographic, holdings and item information
- Amplifies the core purpose of the catalog to provide library users with the best possible access to the collection
- Pursues knowledge of current library trends and innovations; identifies how they may impact bibliographic control and resource management and how they may be adopted to advantage
- Identifies and learns new tools and technical skills that will improve cataloging productivity and enhance access to library resources
- Articulates the need and works to provide bibliographic links in the catalog to electronic and other remote resources

Collection Development and Management

A library's collection of materials is never static. Collection development librarians not only select and deselect materials for the collection, but also develop and implement policies and procedures and ensure that staff are trained on their proper execution.

Builds and maintains a collection of resources in many formats based on a determination of community needs

- Uses statistics and data analysis to make selection and retention decisions
- Conducts surveys that yield quantifiable results in order to make selection decisions
- Demonstrates comprehensive knowledge of the library's collection (subject ranges, age, size, level, strengths and shortcomings) and applies the knowledge to the decision-making process
- Demonstrates broad knowledge of authors, literature and publishers
- Consults a wide variety of sources and connects with other professionals to stay informed about new materials, resources and technologies, and their potential to deliver improved services or reach new target audiences
- Pursues a variety of information sources, including popular media, to keep current on topics relevant to library users
- Strives to build a collection that is diverse, current and relevant, one that reflects the ethnic diversity of the community and promotes cross-cultural understanding
- Assesses and responds to the community's changing needs and interests to inform the ongoing development of the collection

- Determines the availability of electronic resources through statewide contracts or through regional consortia
- Follows trends in traditional and digital publishing and gathers best practices of similar institutions

Establishes and applies selection and evaluation criteria to build a collection of high-quality and relevant resources

- Understands the acquisition and collection development processes and policies for the library
- Identifies and applies objective standards to evaluate the content of resources for accuracy and authority, and identifies any bias or point of view
- Selects and evaluates resources to assure their quality, pertinence, authenticity and inclusiveness
- Determines criteria for evaluating the format, access and presentation aspects of resources to inform selections appropriate to a range of ages and developmental stages
- Follows trends in traditional and digital publishing and gathers best practices of similar institutions
- Consults a variety of review sources, in combination with informed judgment and knowledge of the community, to evaluate materials
- Identifies and evaluates a variety of sources for materials, including commercial and noncommercial

Researches and designs systems and services to provide optimal access to resources

- Organizes and effectively displays information so that it is meaningful and accessible to users
- Determines and provides the appropriate mix of technologies, formats and delivery channels to meet the needs of a variety of users
- Identifies any factors that impede the use of resources and communicates with the information resource designers about usability improvements
- Collaborates with IT and other departments, acting as a user advocate, to develop, implement and evaluate new systems and services that better meet users' needs
- Recognizes the special information access needs of user groups (those with disabilities, those with English as a second language, immigrants, etc.), and provides them with the best possible access appropriate to the library
- Researches and assesses emerging technologies for improved delivery of information resources
- Identifies opportunities to cooperate with other libraries, departments or community organizations to share information resources

Understands and establishes collection development policies and procedures

- Evaluates, recommends and applies policies and procedures for identifying and selecting library materials in all formats
- Possesses up-to-date knowledge of laws pertaining to access to materials, funding and customer privacy
- Ensures that collection policies are consistent with the mission and broader policies of the library and the ALA Library Bill of Rights
- Develops policies and procedures for handling challenges to library materials
- Develops policies for weeding the collection, handling donations and gifts, and disposing of obsolete materials

Ensures that the collection is current, useful and in good condition

- Defines criteria and establishes procedures to evaluate library materials for retention, replacement, duplication or deselection
- Conducts inventories of library materials, analyzes usage and maintains appropriate records in support of maintenance procedures
- Identifies items in need of repair and evaluates the cost effectiveness of repair, replacement and/or withdrawal
- Manages gifts to the collection, including relations with donors, appraisals of value, record-keeping and arrangements for long-term stewardship
- Recognizes items of true historic value and recommends their preservation and conservation for this library or for another collection

Digital Resources Technology

With so many of a library's resources in digital format, especially in large library systems, a host of new skills and knowledge emerge for creating or selecting, organizing, managing and providing access to these digital resources. It's an interdepartmental effort within the library, involving cataloging, preservation, systems and technology.

Selects, organizes and maintains the library's collection of digital resources

- Establishes standards and best practices to assure effective organization, access, preservation and delivery of digital content
- Understands and applies appropriate metadata schemas (descriptive, administrative, technical, rights, etc.) and the standards for expressing and storing these data
- Demonstrates knowledge of multimedia file formats, of tools and processes available for digital file format conversion, and the relative support afforded these formats through Web browsers on various platforms
- Demonstrates working knowledge of best practices, industry standards and services for digitizing various media (text, image, audio, video)
- Defines and implements policies related to digital holdings, including collection, digital preservation, rights management, emergency plans, etc.
- Works collaboratively with enterprise systems, Web services, e-resource management and interface services personnel

Demonstrates working knowledge of programming languages applicable to digital resources

- Demonstrates working knowledge of XML, XSLT and XML Schema
- Deploys XML-based APIs in integrating systems and services
- Demonstrates working knowledge of Web-based publishing tools and coding (see also: Web Design & Development competencies)
- Demonstrates working knowledge of Unix, relational database systems, Dublin Core, METS (Metadata Encoding and Transmission Standard) and OAI (Open Archives Initiative)
- Performs system monitoring, testing and debugging
- Demonstrates working knowledge of Semantic Web concepts (e.g., Linked Data)
- Demonstrates working knowledge of at least one utility scripting language for processing textual data and managing system resources (e.g., Bash scripts, python, ruby or PERL)

Develops and manages interface services to provide integrated access to the library's resources

- Pursues the integration of discovery and delivery interface systems with the ILS and other sources of bibliographic metadata and digital resources
- Evaluates and implements federated search tools for streamlined access to library resources
- Understands the principles of usability and the protocols for user testing; develops and maintains a robust practice of user testing on all interfaces, including mobile technologies and platforms (laptops, tablets, phones other emerging technologies)
- Pursues the integration of library resources with other systems in use in the information space, including institutional website, course management systems or geographic/geospatial information systems
- Experiments with new tools for the delivery of library resources and services to users regardless of location and preferred platform
- Demonstrates working knowledge of SEO (search engine optimization) best practices
- Defines and implements policies for resource delivery, authentication and identity management, working collaboratively within the organization and its partnerships

Pursues efforts to sustain and improve the digital resource systems and services

- Defines, selects and manages a digital asset management infrastructure that supports access to the digital content
- Selects and implements standards-based systems that interoperate with existing bibliographic systems and emerging "cloud-based" products and services
- Demonstrates understanding of ROI (return on investment) for operational budgeting, especially when considering open source software development and TCO (total cost of ownership)
- Understands DAMS (digital asset management systems) principles, products and collaborative developments
- Understands importance of and tools available for user-generated content (evaluative, metadata, "shared" digital objects, etc.) and crowd-sourcing of the descriptive process itself
- Prepares the budget for support of digital resources technologies and in alignment with the library's overall budget
- Generates objective data for the evaluation and ongoing redesign of user interfaces
- Investigates, evaluates and keeps abreast of new developments in digital library systems and services (repository software, metadata management, harvesting protocols, hosted services, etc.)

- Investigates and evaluates new developments in discovery interface systems in alignment with user behavior and expectations
- Promotes use of digital resources; tracks impacts of highlighting the library's digital content on site traffic and SEO rank
- Understands requirements of shared metadata, OAI-PMH (Open Archives Initiative Protocol for Metadata Harvesting)

E-Resource Management

Electronic resources now command a significant portion of a library's collections budget in addition to the staff time to manage them. The management of e-resources introduces new challenges in terms of license agreements, "ownership," budget priorities, distribution, access and more.

Develops and manages the library's collections of electronic resources

- Understands the concepts behind e-resource management systems and maintains awareness of vendors and available products
- Selects, organizes and maintains the library's collection of e-resources
- Evaluates e-resource expenditures, assessing the relative merits of e-vendor options (including cloud-hosting) in terms of integration with the ILS and alignment with the library's mission
- Understands e-resource licensing and issues such as copyright and fair use, and seeks to negotiate licensing terms favorable to the library and its users
- Gathers, maintains and provides reports on the library's subscriptions and/or purchases of e-resources (content coverage, usage rights, licenses, usage statistics, etc.)
- Interprets usage data for electronic journal and database subscriptions and recommends adjustments to allocation of resources or renegotiation of license agreements
- Understands popular e-reader technologies and formats (e.g., kindle, ePub, audiobooks in .mp3, WMA, etc.)
- Teaches staff how to access e-books from catalog or shared publisher platforms across devices: e-readers, tablets, mobile phones, laptops and in library labs

Provides distributed access to the library's collections of electronic resources

- Evaluates, configures and maintains an OpenURL service for linking online resources to identifying services (A & I databases, catalogs, etc.)
- Understands metadata schemes, trends and emerging standards and how they impact the discoverability of resources
- Evaluates, implements and maintains metasearch tools for streamlined access to library e-resources
- Understands and implements options for authenticated access to e-resources appropriate for the parent institution
- Evaluates, configures and maintains services for restricting access to e-resources applicable within the institutional context (e.g., proxy service, single sign-on, Shibboleth, etc.)
- Researches and seeks to provide access to electronic resource collections that meets the needs of mobile users

Preservation

Preservation covers a wide range of activities: repairing the physical damage to well-used materials; transforming physical materials into digital format; or archiving the historic record in its physical and digital forms.

Establishes and implements appropriate techniques for the preservation and conservation of library materials

- Understands preservation and conservation issues, including requirements for archival preservation, format refresh and migration, and proper handling of physical materials
- Identifies and applies appropriate methods and techniques for storage and conservation of all library materials, including archival storage of digital content
- Applies timely and effective techniques for the repair and preservation of library materials in all formats
- Identifies environmental factors that impact the condition of library materials and provides guidelines for monitoring and addressing these factors
- Understands and adheres to collection development policies
- Understands and adheres to library policies for emergency and disaster preparedness and recovery of library materials, including digital materials

Identifies, selects and maintains special collections

- Demonstrates broad knowledge of the history of the book, rare books and book arts
- Identifies collections of historic value or special significance to the institution and articulates the value of building and maintaining the collections
- Identifies and applies special requirements for storage of materials that are of significant historic value (i.e., fragile, light-sensitive, monetarily valuable, etc.)
- Establishes policies and procedures to ensure the security of rare and valuable items
- Establishes policies and procedures for backup-and-restore processes for digital archives

Establishes and implements policies and procedures for digitization of library resources for access and preservation

- Understands and articulates the value of providing access to the digital collections—through item-level metadata, works descriptions and finding aids, as well as the digital object itself
- Understands the theory, processes, standards and best practices of digital resource acquisition ("born-digital"), creation ("digitization" or "reformatting"), management, storage and preservation
- Identifies, procures and maintains digitization hardware and software and/or determines reasons and vendors for outsourcing digitization and preservation solutions
- Manages sustainable digitization projects, including scope, costs, collaboration with other departments/institutions, timeline, delivery and promotion strategies
- Promotes digital collections for greater visibility, making content discoverable through social media and other online channels

Library Management Competencies

Today's organizational cultures are less traditionally hierarchical in structure and focus more on collaboration and empowerment. Library directors and leaders manage traditional responsibilities like finances and facilities, but must also be excellent communicators who inspire others and act with the larger community in mind.

Community Relations

Library directors and leaders demonstrate the value of the library and its services to the community. They form strategic relationships to increase awareness, maximize impact and communicate the need for ongoing support.

Demonstrates the impact and value of the library to the community through ongoing evaluation and assessment of library services

- Discovers and assesses top needs of the community and identifies what the library can do to help
- Uses data to communicate the library's value to decision-makers
- Understands data collection, research and analysis methods
- Collects and shares stories that demonstrate the impact of library services, resources and programs on community needs and the lives of individuals
- Performs outcome-based evaluations to measure the impact of programs and services
- Uses benchmarks and metrics to measure performance against comparable organizations

Builds support for the library among a variety of groups, using the most appropriate methods

- Communicates the value of library services, products and policies to library management, library staff, key stakeholders, user groups and the community
- Communicates the library's need for support clearly and effectively
- Leverages community to build support at the local, state and national levels, both for ongoing library services and special one-time campaigns

- Leverages participation in organizations to promote library initiatives

- Identifies and enlists strategic partners to obtain support for the library

- Develops a clear and coherent advocacy message that can be used by others

Maintains positive public relations through communication and promotion of the library's values, services, accomplishments and needs to all stakeholders

- Promotes the library as a center of lifelong learning for the community

- Sets policies and practices for clear communication to staff, library users, the community, the library board, local and state government, and to funding agencies

- Understands the governance structure in which the library operates

- Maintains visibility in the community by joining and networking with organizations that promote libraries and librarianship

- Encourages dialogue about library services and products in multiple mediums, including print and online

- Encourages awareness of and dialogue about the library and community needs by speaking publicly at programs, events and meetings throughout the community

- Develops relationships with media representatives, community leaders and decision-makers

Builds relationships with community organizations

- Networks and engages in community activities

- Identifies potential partners and opportunities and articulates the mutual advantages of partnership

- Develops and leverages collaborative relationships to facilitate the accomplishment of the library's goals

- Provides leadership to build effective relationships and coordinate efforts between internal and external stakeholders

- Sustains partner relationships for future opportunities

Facilities

As physical collections shift to increased digital availability, libraries are creatively seizing opportunities to rethink the use of their physical space. Facilities are being modified to reflect and serve the learning, collaboration and creation needs of community members.

Creates a welcoming and user-friendly physical environment that encourages all community members to use library services

- Understands space planning issues, including the application of ADA requirements to the physical space and equipment
- Plans for new or updated facilities to meet current and future community needs
- Understands the impact of the physical and sensory elements in the library on user satisfaction and emotional response
- Provides users with comfortable paths and clear signage to navigate through the building
- Monitors the use of facilities and makes changes to improve the user's experience

Plans library spaces that promote community engagement and collaboration

- Plans spaces that foster community collaboration and content creation
- Designs flexible and multi-use spaces to accommodate a variety of programs and services
- Plans commensurate and convenient power and data connections for users
- Assesses the balance between space for community engagement and collection size
- Engages community in space planning and design processes

Creates and maintains a healthy, safe and environmentally responsible environment for library personnel and users

- Understands the scope of building operations and addresses maintenance issues with appropriate inspections and upkeep
- Addresses safety issues through appropriate maintenance and adequate information provided to staff
- Continuously evaluates practices to increase efficiency, minimize waste and comply with environmental guidelines, and works to ensure library operations respect, protect and sustain the natural environment

Financial Management

Competition for resources within a community makes it important for library directors and leaders to not only be ethical stewards of resources, but also active communicators about the value of library services and impact in the community.

(Note: Due to the wide variety of funding structures for libraries, these competencies are more general than specific.)

Understands and employs basic budget and finance concepts and terminology

• Understands and utilizes established accounting practices and procedures

• Develops and evaluates the library budget in alignment with short- and long-range goals and objectives

• Understands and applies federal, state and local financial laws and regulations

• Works with the library board to develop members' understanding of the library finances, including the budget process

Establishes effective financial management processes and services, using sound business and financial judgment

• Monitors economic trends and other fiscal issues for potential impact on the library

• Conducts short-, medium- and long-range fiscal planning

• Conducts financial analysis to identify costs, risks and alternatives, including cost-reduction and value enhancements

• Monitors the progress of contracts for library materials and services

• Promotes and justifies the library's needs to funding authorities

• Assesses needs and develops plans for capital improvement projects

Identifies and pursues multiple funding sources for the library

• Identifies sources for grant funding and writes effective grant applications

• Conducts capital campaigns

• Develops strategies for additional funding sources

• Works with Library Foundation and Friends of the Library groups to generate private-sector support and to cultivate and solicit private donors

Laws, Policies and Procedures

Well-written policies and procedures, based on sound legal footings, help all levels of staff be consistent in their relationships with users, colleagues and other stakeholders.

Understands, applies and explains applicable laws

- Understands and applies state and federal laws that pertain directly to libraries and to public entities in general
- Maintains awareness of current policy and legislative initiatives that may impact library services and administration
- Understands and applies intellectual freedom and civil rights laws
- Understands and applies copyright and intellectual property laws
- Understands and applies laws and policies governing confidentiality and rights to privacy
- Understands and implements the American Disabilities Act (ADA) and state and local regulations where appropriate

Develops policies and procedures based on the library's mission and user needs to guide efficient and effective library operations.

- Develops and updates policies in collaboration with other departments, institutions, regional systems and larger organizations, such as state libraries
- Understands liability and legal issues pertaining to policy and procedure development
- Explains the rationale underlying library laws, policies and procedures and seeks staff and user feedback during policies and procedures development
- Understands the relationship between library policies and customer service and seeks to alleviate policy barriers to good service
- Continuously evaluates the needs for new or revised policies and procedures

Creates policies and practices to ensure safety and security

- Creates and regularly evaluates emergency response policies and procedures and prepares staff to respond appropriately
- Maintains up-to-date policies/procedures for staff communication and crises communication
- Creates and regularly evaluates disaster preparedness and recovery plans for library resources and equipment

Creates, evaluates and implements policies and procedures for library technology

- Establishes network usage policies that balance convenience and usability with security concerns and wise stewardship of resources
- Articulates and applies library policies on privacy, intellectual freedom and filtering as they relate to technology access and use
- Seeks staff and stakeholder feedback during policies and procedures development
- Explains the rationale underlying library technology policies and procedures and communicates effectively in nontechnical language
- Continuously evaluates the needs for new or revised policies and procedures relative to changing technologies
- Develops, reviews and maintains technology procedure manuals
- Creates and regularly evaluates disaster preparedness and recovery plans for library technology

Marketing and Public Relations

Library marketing focuses on engaging with library users, potential users and other stakeholders. Marketing efforts do not come from a single department; they need to be organization-wide.

Understands and applies marketing theory and practices

- Uses multiple formats and channels to communicate with library users, potential users and other stakeholders
- Maintains up-to-date awareness of communication tools and media sources used by target audiences
- Engages with target audiences, connecting via the most appropriate tools and sources (at a computer, on a mobile device, etc.)
- Understands the basic principles of marketing and how they apply to library services
- Conducts research to assess marketing landscape and to determine current position among similar businesses and organizations
- Understands the library's strengths, weaknesses, opportunities and challenges
- Conducts periodic review of the community for opportunities to align needs with library services
- Identifies, analyzes and prioritizes target markets and audiences, and determines how best to promote library services that can effectively serve them

Develops, implements and evaluates an ongoing marketing plan for the library

- Engages in ongoing dialogue with target audiences, including users, potential users and library staff
- Sets measurable market goals and objectives, including brand strategy
- Highlights programming objectives that affect the overall marketing of the library
- Develops consistent promotion and distribution strategies to meet the goals and objectives based on the analysis of target audiences
- Creates graphics standards, style guide and consistent print and electronic visual communication standards
- Creates relevant communication policies and procedures in collaboration with administration and with other departments
- Provides marketing training (how to talk to media, how to promote services, etc.) for all staff, board members and other key stakeholders
- Implements the marketing efforts, maintaining records and clear communication with staff and stakeholders
- Evaluates the effectiveness and impact of the strategies and revises as necessary

Organizational Leadership

Library directors and leaders help everyone understand the vision of the library and the connection to community needs. Leadership empowers staff and encourages collaboration and learning.

Uses leadership skills to provide vision and guidance to library staff, board members and the community

- Articulates the mission, vision and values of the library organization
- Aligns the library with, and is supportive of, the strategic directions and needs of the community
- Defines and communicates the library's goals and objectives aligned with the library's mission and vision
- Evaluates and revises if necessary the library's mission, vision, value statements and strategic plan
- Understands the social, political and economic context in which the library exists
- Models accountability for quality and timeliness of work and reliability in achieving excellent results

Contributes effective strategies and decisions regarding library services and resources

- Conducts a SWOT analysis to determine the strengths, weaknesses, opportunities and threats
- Tracks metrics over time for measurable outcomes of services and programs
- Recommends adopting, modifying or eliminating services based on the best available evidence
- Prepares for and responds to crises and unanticipated events

Provides effective leadership of all stakeholders and teams

- Builds trusting relationships with stakeholders and prioritizes communication and dialogue
- Uses an inclusive, open and transparent approach to decision-making
- Demonstrates social and cultural intelligence
- Secures and allocates resources to assure stakeholders' accomplishment of tasks and responsibilities
- Facilitates team meetings and collaborative processes effectively

Embraces change and fosters understanding and acceptance by all stakeholders

- Encourages new ideas, keeps current on trends and issues, and seeks and sponsors innovations
- Recognizes the benefits of change and understands the principles, processes and responsibilities for managing organizational change
- Approaches planning, implementing and evaluating change collaboratively
- Prepares staff, Library Board, users and other stakeholders for change through persuasive and effective communication to raise awareness, build commitment and ensure understanding
- Anticipates change-resistant behavior (fear, conflict, negativity, complacency) and applies strategies to address it

Personnel Management

Staff are the most important resource for achieving the library's mission and goals. From hiring to training and providing feedback, support for learning and innovation needs to be communicated.

Contributes to a productive workforce through effective recruitment and selection

- Develops and applies consistent and effective interviewing techniques
- Seeks candidates who demonstrate strong interpersonal skills, collaborative approaches, critical thinking skills and problem-solving abilities.

- Makes hiring decisions based on sound evaluation methods

- Understands and complies with employment laws and regulations that impact recruiting and hiring

- Understands and complies with library policies and procedures that impact recruiting and hiring

- Values a diverse workforce and recruits for diversity

Leads and empowers employees to deliver effective, high-quality library service

- Fosters and facilitates a collaborative environment based on a shared vision

- Communicates support for and value of ongoing learning within the organization

- Models enthusiasm and commitment and energizes staff to meet defined goals

- Communicates clearly and regularly with staff about library, government or major community changes that may affect them

- Promotes collaboration and teamwork among staff and promotes team-building practices

- Ensures that diversity needs are respected and supported in HR processes

- Recognizes staff achievements through formal and informal methods

Establishes effective strategies for performance management

- Establishes clear performance expectations and involves employee in performance review

- Enables staff to strive for continuously higher standards of performance

- Creates a culture of learning and innovation, with tools, resources and opportunities to continuously learn and grow

- Establishes methods for review and evaluation of performance and holds all staff accountable to meet performance expectations

- Provides regular and constructive feedback, using a two-way dialogue for the process

- Takes timely and consistent corrective/disciplinary action when appropriate

Understands and applies legal standards and requirements for performance management

- Understands and complies with employment laws and regulations that impact performance management

- Understands and ensures compliance with human resources policies and procedures

- Promotes effective labor relations and maintains a productive working relationship with employees and their representatives

- Understands contract negotiation and administration

- Understands a variety of problem-solving techniques and applies them to dispute resolution

Works appropriately with consultants and volunteers

- Develops and applies consistent practices for hiring consultants and recruiting volunteers
- Articulates the need for consultants and/or volunteers and defines clear roles and responsibilities
- Develops and administers contracts
- Provides effective training and supervision of volunteers

Project Management

Effective project management involves managing people, resources and time. Leaders recognize that communication is essential throughout the project life cycle.

Employs sound project management principles and procedures in the planning and implementation of programs and services

- Understands the basic principles and procedures of project management
- Defines outcomes and expectations based on user requirements and needs
- Develops support for projects that implement library goals and objectives
- Utilizes technology tools to increase project management efficiency
- Uses resources efficiently and manages effectively within budget limits

Leads work teams with clear direction and effective communication

- Conducts strategic selection of team members
- Develops a work plan with tasks, timeframes, milestones, resources and realistic deadlines
- Anticipates potential problems, sets controls and contingency plans, and responds effectively to resolve barriers
- Demonstrates flexibility, creativity and patience as needed throughout the life cycle of a project.

Monitors and evaluates projects and adapts as needed

- Establishes processes for collecting, documenting and reporting data
- Monitors project progress and evaluates performance to ensure quality and quantity standards are met
- Fulfills legal or project requirements for compliance, recordkeeping and reporting
- Analyzes and identifies dissemination strategies, and reports project data and outcomes to stakeholders

Staff Training and Development

Helping patrons and community members develop 21st century skills requires staff with 21st century skills of their own. Creating an overall organizational culture that fosters learning and innovation requires administrative support and prioritization.

Technically, this is a subset of Personnel (HR) Management, but it is called out separately due to the primary focus that WebJunction places on this set of competencies.

Establish strategies and long-range initiatives to create a learning environment within the library

- Promotes the importance of ongoing professional learning and creates and supports opportunities to learn and to implement ideas
- Creates opportunities for experiential and project-based learning
- Understands how the learning function for library staff relates to the provision of quality library service
- Creates a culture that encourages both formal and informal learning processes in the workplace
- Promotes a performance-based culture that aligns learning goals and objectives with desired outcomes
- Fosters staff growth and opportunity through mentoring

Plans for and supports staff career development opportunities

- Conducts assessment of staff to analyze training needs
- Correlates training needs with identified internal and external changes that impact the library
- Utilizes competency-based or other methods for assessing staff skills and supporting career development opportunities
- Conducts and summarizes a job task analysis
- Creates development plans for staff to gain necessary competencies (knowledge, skills, abilities, behavior, attitudes)
- Creates and identifies learning opportunities that foster 21st century skills, such as problem-solving, critical thinking, communication and innovation

Develops and implements a culture that embraces ongoing learning

- Provides opportunities and support for peer-to-peer learning and collaborative relationships
- Creates an environment that accommodates risk taking
- Encourages experimentation, tinkering and play as learning methods
- Understands and applies knowledge of adult learning theory
- Designs training activities to meet the needs of targeted audiences and to support specific results
- Develops and implements training solutions that focus on the learner and accommodate different learning styles
- Understands the variety of instructional methods available, including e-learning and blended learning
- Understands and applies instructional design concepts
- Manages the learning environment for optimal participant experience and value

Develops effective methods to evaluate learning initiatives

- Involves each employee in the development, pursuit and assessment of his or her own learning goals
- Communicates the expectation for self-direction regarding setting and reaching learning goals
- Determines measures of success for all training strategies
- Employs multiple evaluation techniques
- Develops processes to evaluate transfer of learning to the workplace and achievement of targeted competencies
- Provides time and procedures to review and reinforce learning

Strategic Planning

Collaborative and deliberate planning helps ensure that library services are responsive to community needs.

Designs and implements an ongoing strategic planning process for the library

- Develops strategic plans to align with and fulfill organizational goals
- Discovers and assesses top needs of the community
- Creates appropriate goals, objectives and activities that reflect analysis of community needs
- Anticipates and predicts changing trends and influences

- Actively involves the community and stakeholder groups in developing and refining the plan
- Promotes the plan's value to the community
- Ensures that long-term goals and objectives align with daily decisions and operations

Performs ongoing evaluation to gauge the success of the strategic plan

- Develops and applies appropriate methods to continually measure and ensure the quality and value of library services
- Modifies the strategic plan and redesigns processes as needed in response to ongoing analysis of community needs
- Involves community stakeholders in the evaluation of library services
- Monitors progress of service planning and provides follow-up, educational and accountability measures

Collaborates with IT to create and implement an ongoing technology planning process that integrates with the strategic plan

- Establishes clear priorities for technology plans that align with the library's ongoing operations and strategic plan and the needs of the library users
- Anticipates and predicts changes, trends and influences to effectively allocate resources and implement appropriate library technology initiatives
- Investigates and analyzes the needs of the community and environment to understand current and future needs and trends
- Develops and applies evaluation measures that gauge the success of technology efforts

Trustees, Friends and Foundation

The Library Board (Trustees) plays a critical role in the governance of the library. Friends of the Library and Library Foundations provide vital support of the library, raising money and solidifying community relations. The library director and leaders need to collaborate effectively with these groups.

Manages the relationship and communication with the Library Board (Trustees)

- Understands the roles and relationships of the Library Board and the library administration
- Practices strategic recruitment for new Board members
- Provides orientation and ongoing training as needed for Board members

- Provides timely and pertinent information and facilitates communication to support the Board's decision-making
- Works with the Board to assess and adopt policies that meet user needs
- Works with the Board to plan for the future needs of the library
- Works with the Board to promote the library in the community

Understands and sustains the library's roles and relationships with the Friends of the Library

- Recognizes the benefits derived from a Friends group
- Develops and monitors operating agreements between the library and the Friends group
- Maintains ongoing communication about the library's planning process and evolving goals and needs
- Works with the Friends of the Library to promote the library within the community

Understands and sustains the library's roles and relationships with the Library Foundation

- Recognizes the benefits derived from a Library Foundation
- Maintains ongoing communication about the library's planning process and evolving goals and needs
- Works with the Foundation to plan and fund projects that address priority community needs and benefit users and potential users
- Works with the Foundation to promote the library within the community

Public Services Competencies

All of the services that interface directly with the library's users come together under the heading of public services. These frontline staff anticipate and meet the needs of users in the most visible way. Fully supported by all of the other sectors and departments, they work to provide the best possible programs and services to the library community.

Adult and Older Adult Services

Libraries have the capacity to inspire, engage and support community members of all ages. Libraries provide an array of opportunities for adult patrons from diverse backgrounds.

Outreach

Designs and implements library services to engage and meet the needs of the community

- Uses a variety of ongoing methods to determine the interests of adults in the community (obtains demographic data, surveys users and non-users, follows current events, collects input from frontline staff, etc.)
- Analyzes demographic and other data collected about the community and develops a wide variety of services to meet the needs and interests of target audiences
- Identifies potential partner organizations within the institution or in the community that have compatible goals and objectives to serve adults, and develops cooperative services and programs to extend and enhance library service
- Aligns all services and programs with library policies and procedures
- Evaluates all services, using appropriate evaluation strategies (evaluation forms, customer satisfaction surveys, input from frontline staff and other stakeholders, etc.), and uses the results to improve future services

Defines and implements outreach services for the library community to increase use of library services and to reach underserved populations

- Identifies individuals and groups not adequately served (those with disabilities, homebound, institutionalized, remote, non-English speaking, immigrant, low literacy, etc.)
- Determines the particular needs of each target audience and designs a variety of programs and services appropriate to them
- Identifies individuals and groups not currently served by the library, determines needs, develops programs and services, and promotes them to the non-users with targeted marketing
- Aligns all outreach efforts with the library's overall goals and objectives
- Determines the best means to deliver library services to remote users (mail, bookmobile, online, multimedia) appropriate to library resources
- Designs programs and builds collections and information resources to meet the special language and literacy needs of the community
- Collaborates with other community groups to meet the literacy needs of target audiences

Uses online tools and communities to engage with and provide services to users

- Understands and articulates the importance of engaging with users virtually
- Investigates and evaluates tools for virtual engagement, and identifies those most applicable to the library's services and community needs
- Determines objectives for enhancing library services and access, and acquires proficiency with selected tools to provide effective library services
- Uses social networking to interact with users and meet their information needs
- Understands established policies and procedures for online engagement with users
- Devises strategies to keep up with emerging tools and techniques, and connects with professional communities to seek and share best practices

Adult (General) Programming

Designs, implements and sponsors library programs that provide opportunities for information, entertainment and lifelong learning

- Demonstrates ability to be creative, promote new ideas and identify a variety of tools and techniques to create interesting and engaging programs
- Aligns programs with the library's goals and objectives and with the identified interests and needs of the community
- Provides resources and programming that serve the needs of makers and do-it-yourselfers in the community
- Actively involves users in planning, implementing and evaluating programs
- Creates programs that encourage audience participation and dialogue and encourage peer-to-peer knowledge sharing
- Promotes the library's programs to the community in coordination with marketing efforts
- Develops programs to acknowledge and celebrate the cultural diversity of the community
- Develops programs that encourage learning and dialogue in support of 21st century themes, such as civic literacy, health literacy, environmental literacy, financial literacy and global awareness
- Understands the value of games and gaming for adults and develops gaming programs
- Identifies program venues outside of the library
- Coordinates with collection development efforts in support of programming
- Evaluates programs using appropriate evaluation strategies (evaluation forms, debrief with presenters, input from frontline staff, etc.), and uses results to improve future programming efforts

Older Adult Services and Programming

Research has shown that older adults (defined broadly as patrons aged 55+) wish to remain engaged in the community and to continue learning. Libraries can help them achieve both of these goals.

Designs and implements library services to meet the needs and interests of older adults in the community

- Analyzes demographic and other data collected about older adults in the community to assess their unique needs
- Develops a wide variety of services to meet the needs and interests of older adults and of their families and caregivers, as members of the sandwich generation
- Understands the range of older adults (baby boomers to the elderly) and identifies their particular needs and interests, acknowledging the range of skills, knowledge, strengths and limitations they bring to the library
- Recognizes that older adults need 21st century skills and provides opportunities for building the five literacies (e.g., basic, information, civic and social, health and financial)
- Creates programs and other opportunities for learning and interaction, including intergenerational activities and opportunities for civic participation
- Partners with organizations within the institution or in the community that have compatible goals and objectives to serve older adults, and develops cooperative services and programs to extend and enhance older adult services
- Identifies and maintains regular communication with agencies, institutions and organizations serving older adults in the community
- Engages older adults for input when planning, implementing and evaluating programs and services

Defines and implements outreach services to increase older adults' use of library services and to reach underserved populations

- Ensures that older adult audiences are included in the target audiences for the library's outreach efforts
- Identifies older adults who are unable to visit the library, determines their special needs for library resources, and determines the best means to deliver library services to them
- Understands and addresses specialized concerns of some older adult users (disliking change, loss of personal freedoms or controls, slowly adopting new technologies, etc.)

Designs, implements and sponsors library programs for older adults that provide information, entertainment and opportunities for lifelong learning

- Acknowledges the knowledge and experience of older adults and provides opportunities for them to use these lifetime strengths in volunteering with the library
- Creates programs that provide older adults with an opportunity to interact and share their knowledge, experiences and stories
- Actively involves older adults in planning, implementing and evaluating programs
- Promotes the library's programs to the older adult community in coordination with marketing efforts
- Recognizes the challenges and opportunities that digital literacy provides for older adults and provides learning assistance to foster confidence and learning
- Understands the potential of games and other group and individual activities to foster cognitive and mental stimulation and social involvement, and identifies a variety of methods to meet those needs

Readers' Advisory

Assists users with choosing popular and recreational reading, viewing and listening choices

- Demonstrates a broad knowledge of the library's collection and of a wide range of materials of interest to library readers
- Demonstrates the ability to read widely, formulate connections between resources and converse with users about the resources
- Understands the theory of appeal, listens carefully to information elicited from the user and bases recommendations on an interpretation of what appeals to the user
- Communicates succinctly but effectively the character and appeal of a book, both in writing and speaking
- Identifies and recommends a selection of materials that align with what appeals to the user
- Seeks feedback from readers on recommended materials and adjusts future recommendations accordingly
- Creates booklists, read-alikes, read-arounds, book-talks, displays, electronic documents and other special tools to increase access to library resources and promote their use
- Engages with users virtually as well as face-to-face for readers' advisory interactions
- Uses social networking sites and tools to spark conversations with community members about titles, authors and reading

- Implements reader input forms (both print and online) to provide personalized service to readers
- Explores and implements ways technology can connect readers' advisory to the library's catalog, such as reading lists

Develops strategies and sources to stay well-informed as a readers' advisor

- Identifies and uses a variety of readers' advisory resources to identify materials
- Maintains an ongoing knowledge of major new authors, fiction genres, nonfiction subjects and current releases
- Keeps current with popular culture through a variety of channels
- Connects with professional communities to seek and share best practices for readers' advisory

Reference

Develops and maintains a collection of reference resources to meet community needs

- Discovers and assesses needs of the community and identifies how the library can help
- Demonstrates knowledge of the reference collection, including both print and online resources
- Provides a variety of readily accessible reference resources that meet identified community needs, such as job seeking and health information seeking
- Prepares bibliographies, subject collections and other user guides to resources in a variety of formats, and creates tutorials to help users navigate information sources
- Ensures that information sources are available in formats accessible virtually, including users who are accessing via a mobile device
- Compiles and maintains information about community resources appropriate to users' needs and connects users with these resources when appropriate
- Performs ongoing evaluation of the currency and usefulness of the reference collection and makes recommendations for acquisition or deselection

Facilitates library users' requests for information

- Maintains a friendly and approachable demeanor that invites interaction
- Establishes rapport with information seekers quickly
- Communicates effectively in both face-to-face and online interactions
- Practices effective reference interviewing skills to identify and satisfy a user's needs

- Addresses the information-seeking behaviors and needs of users without bias across the spectrum of age, race, gender, ethnicity, ability or economic status
- Serves as a guide for collaborative and participatory learning
- Provides support for users and their self-directed learning endeavors
- Provides instruction and support to users that enhances critical thinking and problem-solving abilities
- Uses current technology tools for research and makes exploration of new tools and platforms an ongoing effort
- Acknowledges users' knowledge and engages them as partners in seeking information and choosing resources
- Answers questions knowledgeably, providing information of an appropriate scope and reading level
- Personalizes and customizes resources for the particular needs and priorities of individuals
- Evaluates the success of reference services through feedback from staff, users and other stakeholders
- Identifies opportunities for instruction and empowers users to improve their own information-seeking ability

Demonstrates ability to meet information-seeking needs of users

- Demonstrates flexibility and adapts to the changing ways in which users interact with information
- Demonstrates advanced search skills
- Understands and performs effective search queries, using multiple resources and search strategies
- Synthesizes information from a variety of resources and evaluates results for quality and accuracy
- Demonstrates proficiency in website editing in order to update online resources and utilize various technologies to interact most effectively with online users

Children's Services

Libraries help support the learning needs of young children and their families, schools and caregivers. Libraries and librarians can contribute to a child's lifetime success.

(Note that these competencies build on the general adult competencies and other public services. Statements are included here only if they have a specific application to children.)

Children's Services Outreach

Designs and implements library services and spaces to meet the needs and interests of children in the community

- Analyzes demographic and other data collected about the community and develops a wide variety of services to meet the needs and interests of children and their families and caregivers
- Ensures that policies and procedures for children's services are aligned with federal, state and local law and with the library's policies and procedures
- Provides services and spaces appropriate to the developmental needs of children
- Creates and sustains learning environments that address the social, emotional and cognitive aspects of learning, including self-direction, critical thinking and problem solving
- Provides easily accessible, high-quality learning experiences for children
- Provides experiences, resources and interactions that fuel a love of learning
- Provides learning opportunities for children that are self-directed, experiential and content-rich
- Solicits and considers the opinions and requests of children when planning, implementing and evaluating programs and services
- Partners with organizations within the institution or in the community that have compatible goals and objectives to serve children, and develops cooperative services and programs to extend and enhance children's and family programs
- Identifies and maintains regular communication with agencies, institutions and organizations serving children in the community

Articulates and communicates to stakeholders the needs of children to receive quality library service

- Designs, implements and evaluates ongoing public relations directed toward children and their caregivers, with recognition of the diversity of the community
- Models and promotes a welcoming, supportive and nonjudgmental attitude toward children and their families and caregivers
- Promotes awareness of children's services to other staff members and contributes to their orientation and training in relation to the delivery of those services
- Promotes awareness of children's services within the library governance structure and lobbies for inclusion in the library's plans and budget processes
- Ensures that the needs of children are considered in overall library planning, including the application of ADA regulations and the appropriate access to resources and services

Defines and implements outreach services to increase children's and families' use of library services and to reach underserved populations

- Identifies children (individuals and groups) underserved or not yet served (those with disabilities, home-schooled, institutionalized, remote, non-English speaking, low literacy, etc.)
- Seeks to address knowledge and opportunity gaps that may exist due to socioeconomic factors
- Determines the particular needs of each target audience, designs a variety of programs and services to match their needs, and promotes them with targeted marketing
- Establishes an environment in which children receive courteous service and are encouraged to use the library and participate in library programs

Works with parents, caregivers and other adults who serve children

- Recognizes that family members are a child's first teachers and engages them in identifying resources and services
- Understands the importance of informing and coordinating with a variety of community members who work with children (parents, educators, daycare providers, etc.)
- Builds and updates knowledge of available resources that may serve the needs of children, families and caregivers
- Identifies the need to educate adults who care for children and offers a variety of resources to help them provide improved care and guidance

Provides tools, resources and support to encourage digital literacy and provide age-appropriate technology services to children

• Understands and articulates the importance of introducing children to age-appropriate digital tools and resources

• Fosters the development of children's digital literacy

• Investigates digital tools and social networking communities oriented toward children, and evaluates them for their potential to enhance learning and meet information needs of children

• Understands the unique opportunities, norms and limitations of online engagement for children, and establishes guidelines for the use of social networking tools appropriate to the library setting and to the age groups

• Assists children in accessing and using digital resources, including online tools and social networking communities

• Helps children, parents and caregivers navigate new technologies and identify trustworthy online resources

Collections for Children

Builds a collection designed to meet the needs and interests of children

• Applies knowledge of the community and solicited input from children, families and caregivers to build a children's collection that is diverse, current and relevant

• Demonstrates comprehensive knowledge of the library's children's and other relevant collections (subject ranges, age, size, level, strengths and shortcomings) and applies the knowledge to the decision-making process

• Demonstrates broad knowledge and appreciation of children's literature, including authors and publishers

• Establishes criteria for evaluation (content, educational value, entertainment value, literacy value, age-appropriateness, etc.) of children's materials in all genres and formats

• Evaluates, recommends and applies collection policies for children's materials consistent with the library's general collection development policies, including policies to handle challenges to materials

• Evaluates and selects materials and resources in various formats, including digital media, educational apps, videos and e-books for children

• Ensures that community information resources address the needs of children and their families and caregivers

- Displays and markets materials to be attractive and enjoyable to children, as well as convenient to use
- Ensures that the collection reflects the diversity of the community, and helps to familiarize children and their families with other perspectives (ethnic, racial, gender, socio-economic, sexual preference, etc.)

Establishes and pursues strategies to stay informed about current and relevant information resources to meet children's evolving needs

- Pursues a variety of information sources, including popular media, to keep current on topics relevant to children and families, and to identify key changes in their needs and tastes
- Connects with children, families and others who work with children to stay informed about new materials, resources and technologies
- Maintains the quality and relevance of the collection through ongoing evaluation of the currency and physical condition, and recommends materials for acquisition or deselection

Facilitates children's requests for information and provides accurate and appropriate answers

- Understands and practices effective reference interviewing skills particular to soliciting actual and unstated needs and protecting the confidentiality of children
- Addresses the information-seeking behaviors and needs of children without bias across the spectrum of age, race, gender, ethnicity, ability or economic status; responds to questions regardless of their nature
- Identifies opportunities for instruction and empowers children to improve their own information-seeking ability
- Establishes effective measures to manage Internet and other electronic resources that provide children with appropriate access

Connects children and their families and caregivers with resources that encourage reading

- Creates booklists, read-alikes, read-arounds, book-talks, displays, electronic documents and other special tools to appeal to children
- Identifies and uses a variety of online and print children's readers' advisory resources to identify materials
- Maintains an ongoing knowledge of major new authors, fiction genres, nonfiction subjects and current releases, including media and genres of particular interest to children (magazines, manga, AV, etc.)

- Seeks input from children, families and caregivers to inform future recommendations
- Collaborates with families, schools and other community groups to promote reading and literacy to children
- Understands the theories of reading development for children (including early and emergent literacy) and the reading curriculum used by community schools

Children's Programming

Designs, implements and sponsors library programs that offer information, special skills or entertainment for children and their families and caregivers

- Uses a variety of methods to determine the interests and needs of children, families, caregivers and others who work with children in the community (obtains demographic data, surveys users and non-users; follows news and entertainment sources; collects input from frontline staff and community organizations that work with children, etc.)
- Designs a wide variety of programs appropriate to the identified interests and developmental needs of children, recognizing the breadth of needs from very early childhood to tweens
- Demonstrates creativity, openness to new ideas, knowledge of a variety of tools and techniques and a sense of humor
- Provides programs and services that enhance literacy, reading and STEM (science, technology engineering and mathematics) skills
- Creates and delivers programs and services that allow children to continue learning and skill-building outside of school
- Identifies program venues outside of the library that appeal to children
- Create exhibits, outreach programs and spaces that foster experiential learning
- Evaluates all programs, soliciting feedback from children and families, and uses those results to improve future programs for children

Develops and promotes learning spaces and programs for children and their families

- Understands and promotes the value of games for children (educational, cognitive stimulation, social value, reaching underserved, etc.)
- Understands and promotes the value of programs that involve making and creating

- Investigates the options for active learning programs (through research, benchmarking with similar organizations, consulting with parents and caregivers, etc.) and makes informed choices about age-appropriate activities for children

- Identifies a variety of games appropriate for children (board games, video games, group games, etc.), and invents creative ways to promote them to the target audiences

- Develops programs to accomplish specified objectives (e.g., bringing families to the library, bridging cultural gaps, etc.)

- Evaluates the outcomes of children's gaming programs, involves families and caregivers in the evaluation process, and recommends improvements for future efforts

Circulation Services

Circulation and interlibrary loan are like the circulatory system of the library body—keeping materials flowing in, out and around in a well-regulated manner, striving to deliver the right item at the right time.

Understands and performs basic circulation operations

- Demonstrates general knowledge of the library automation system in use and specific knowledge of the operations that apply to circulation procedures

- Performs circulation procedures for all library materials (check-in, check-out, renew, place holds, financial transactions, recordkeeping, etc.)

- Accesses the OPAC (online catalog) and uses a variety of tactics to locate items in the collection (via subject heading, author, title, keyword searches, etc.)

- Explains and performs intra- and interlibrary loan procedures, document delivery, resource sharing, reserves and other information retrieval options

- Understands, explains and adheres to circulation and resource sharing policies and procedures, including privacy and copyright issues, providing fair and equal access to the library's collection

- Keeps current with changes in the automation system and in circulation operations and policies

- Performs procedures for shelving, shifting and shelf reading

- Communicates effectively with a variety of audiences and individuals from diverse backgrounds

Patron Training

Depending on the size of library, there may be management positions or whole departments responsible for fostering patron learning. In some libraries, volunteers may be leading patron training. No matter where the responsibility resides, patron training and the advancement of 21st century literacy skills are crucial ways in which the library serves its community.

Plans and manages training programs to meet lifelong learning needs of users

- Establishes a budget for patron training and promotes its value to the library's budget authorities
- Establishes a plan for marketing and promotion of patron training, including outreach and community based efforts
- Identifies opportunities to partner with other departments or organizations to collaborate on training programs
- Identifies opportunities for combining training for staff and users; understands the advantages and disadvantages of doing so
- Identifies resources for training (technology, space and trainers) and coordinates with appropriate departments to obtain them
- Advocates for improvements to training space and equipment as needed, in order to create a setting that is conducive to learning
- Identifies and manages trainers (staff, external, volunteers) and training materials (use external, create new, repurpose existing); manages scheduling of classes
- Evaluates training programs, using appropriate evaluation strategies (post-class evaluation forms, debrief with trainers, etc.) and uses results to improve future training content and delivery

Designs training curricula to build 21st century literacy skills and to meet lifelong learning needs of users

- Understands the scope and the importance of 21st century literacy skills and defines goals applicable to the institution
- Defines desired outcomes for patron training programs and builds a curriculum to meet those outcomes
- Identifies topics of importance and interest to library users by a variety of ongoing means (benchmarking with similar institutions, surveying users, collecting input from frontline staff, etc.)
- Stays aware of changes and adapts and updates, incorporating changes into training
- Understands and applies basic instructional design principles to design training

- Understands and applies learning theory, including learning styles, learner motivation and experiential learning
- Networks, collaborates, and shares expertise with library training peers by participating in online groups, e-mail lists and face-to-face opportunities
- Attends workshops and webinars to constantly develop training skills

Delivers formal training to fulfill objectives of the patron training programs

- Articulates the library's objectives for training users
- Selects the appropriate style and presentation methods for delivery of training, based on an understanding of adult learning principles
- Plans and prepares for learning session, including selection and preparation of class materials
- Prepares the learning environment, including set-up of computer labs
- Practices effective training techniques (presents ideas clearly, employs interactivity, uses a variety of approaches to accommodate learning styles, actively listens to student input, etc.)
- Demonstrates patience and empathy for learner needs and abilities
- Fosters a positive learning atmosphere, one that respects and values diversity
- Accepts feedback on effectiveness of training and seeks opportunities to improve techniques and behavior

Provides informal instruction and assistance to build skills of library users

- Perceives needs of users for "just in time" learning and demonstrates readiness to assist at the level of need
- Demonstrates patience and empathy for learner needs and abilities; practices active listening and seeks to convey ideas clearly
- Identifies and makes available tutorials and other resources for users' self-paced learning
- Assists library users with searching the library's catalog and helps them develop the ability to recognize an information need, meet it and evaluate the results
- Responds to questions and assists library users with their own devices, such as laptops, tablets, e-readers, smartphones, etc.
- Recognizes a user's need for formal learning and identifies appropriate opportunities in the library's class schedule or through other community organizations

Assists users on the public access computers with learning basic technology skills

- Instructs users in the use of the access, reservation, time and print management systems
- Understands and explains the security restrictions of the public computers and the user's options for saving files
- Demonstrates patience and empathy for learner needs and abilities
- Assists users in learning to use the mouse, keyboard, operating system, etc.
- Assists users in accessing and navigating the Internet, understanding common security protocols, locating resources, and downloading and saving files of all types
- Assists users with online communication tools (sign up, create or reply to messages, manage contacts, attach files, identify spam and phishing messages)
- Helps patrons with questions and troubleshooting in areas where proficiency has not been attained

Public Access Technology

Computers for public use are among the main attractions that bring people into the library. Public computing has come a long way since its introduction in the mid-1990s. Progress has entailed increasing demands on the library to determine policies and on library staff to assist users with a variety of devices and software programs.

Provides support and assistance to users of the library's public access technology, peripherals, devices and networks

- Provides one-to-one assistance to users of the library's public access computers and printers
- Refers library users to technology training classes provided by the library and by other organizations in the community as appropriate
- Directs users of the library's public access computers to self-paced tutorials for learning as appropriate
- Supports users of the library's multimedia production equipment (e.g., digital cameras, audio recorders, video cameras)
- Assists people in connecting to the library's wireless network
- Assists people in retrieving data from and storing data to portable devices (such as "thumb drives") or to Web-based storage options (in "the cloud")

- Assists people creating digital content using the library's video/audio recording and editing software and equipment
- Assists people in using the library's wireless printing
- Assists people in using the library's scanner and photocopier
- Assists people in using the library's adaptive and assistive technology
- Provides resources, support and permission for people to tinker, experiment and play with technology

Maintains and troubleshoots the library's public access technology, peripherals, devices and networks

- Develops and executes plans for maintenance and update tasks of public computer hardware, operating systems, security and applications
- Logs issues with technology and reports to IT staff systematically
- Keeps current with advances in tools and applications of benefit to users and determines the implications of deploying them on the public computers

Develops, implements and communicates policies and practices for public access technology

- Understands and utilizes reservation, time and print management systems
- Establishes and publishes acceptable use policies for public access computers and wireless networks
- Understands filtering issues in relation to E-Rate and LSTA funds
- Understands issues related to access to social networking sites and programs

Young Adult Services

Libraries and librarians can engage and empower young adults, providing opportunities for learning and growth. Spaces and resources are important, but staff who value and encourage young adults are key.

(Note that these competencies build on the general adult competencies and other public services. Statements are included here only if they have a specific application to the young adult population.)

Young Adult Services Outreach

Designs and implements library services to meet the needs and interests of the young adult community

- Analyzes demographic and other data collected about the community and develops a wide variety of services to meet the needs and interests of young adults
- Ensures that policies and procedures for young adult services are aligned with federal, state and local law and with the library's policies and procedures
- Provides services and spaces appropriate to the developmental needs of young adults
- Involves young adults in planning, implementing and evaluating programs and services
- Partners with organizations within the institution or in the community that have compatible goals and objectives to serve young adults, and develops cooperative services and programs to extend and enhance young adult programs

Articulates and communicates to stakeholders the needs of young adults to receive quality library service

- Designs, implements and evaluates (with teen involvement) ongoing public relations directed toward and recognizing the diversity of young adults
- Models and promotes a welcoming, supportive and nonjudgmental attitude toward young adults
- Promotes awareness of young adult services to other staff members and contributes to their orientation and training in relation to the delivery of young adult services
- Promotes awareness of young adult services within the library governance structure and lobbies for inclusion in the library's plans and budget processes
- Ensures that the needs of young adults are considered in overall library planning, including the application of ADA regulations and the full access to resources and services

Defines and implements outreach services to increase young adults' use of library services and to reach underserved populations

* Identifies young adult individuals and groups underserved or not yet served (those with disabilities, home-schooled, institutionalized, remote, non-English speaking, low literacy, etc.)
* Determines the particular needs of each target audience, designs a variety of programs and services appropriate to them, and promotes them with targeted marketing
* Establishes an environment in which young adults receive courteous service and are encouraged to use the library and participate in library programs

Uses online tools and social networking communities to engage with and provide services to young adults

* Understands and articulates the particular importance of engaging with young adults in nontraditional ways that extend beyond the physical library
* Involves young adults on an ongoing basis in the investigation and evaluation of tools to identify those most applicable to the library's young adult services
* Possesses extensive knowledge of social networking and uses it to engage with and provide services to young adults
* Understands the unique opportunities, norms and limitations of online engagement with young adults, and establishes guidelines for the use of social networking tools appropriate to the library setting
* Assists young adults in understanding ways to engage in healthy and safe online behaviors

Collections for Young Adults

Builds a collection designed to meet the needs and interests of young adults

* Applies knowledge of the community and solicited input from teens to build a young adult collection that is diverse, current and relevant
* Demonstrates comprehensive knowledge of the library's young adult and other relevant collections (subject ranges, age, size, level, strengths and shortcomings) and applies the knowledge to the decision-making process
* Demonstrates broad knowledge and appreciation of authors, literature and publishers of young adult literature

- Establishes criteria for evaluation (content, educational value, entertainment value, literacy value, age-appropriateness, etc.) of young adult materials in all genres and formats
- Evaluates and selects materials and resources in various formats, including digital media, educational apps, videos and e-books for young adults
- Ensures that community information resources address the needs of young adults and their families
- Displays and markets materials to be attractive and enjoyable to young adults, as well as convenient to use
- Ensures that the collection reflects the diversity of the community, and helps to familiarize young adults with other perspectives (ethnic, racial, gender, socio-economic, sexual preference, etc.)

Establishes and pursues strategies to stay informed about current and relevant resources to meet young adult's evolving needs

- Pursues a variety of information sources, including popular media, to keep current on topics relevant to young adults and to identify key changes in their needs and tastes
- Connects with young adults and others who work with young adults to stay informed about new materials, resources and technologies
- Maintains the quality and relevance of the collection through ongoing evaluation of the currency and physical condition, and recommends materials for acquisition or deselection

Facilitates young adults' requests for information and provides accurate and appropriate answers

- Understands and practices effective reference interviewing skills particular to soliciting actual and unstated needs and protecting the confidentiality of young adults
- Addresses the information-seeking behaviors and needs of young adults without bias across the spectrum of age, race, gender, ethnicity, ability or economic status; responds to questions regardless of their nature
- Identifies opportunities for instruction and empowers young adults to improve their own information-seeking ability
- Establishes effective measures to manage Internet and other electronic resources that provide young adults with equal access

Connects young adults and their families with resources that encourage reading

- Creates booklists, read-alikes, read-arounds, book-talks, displays, electronic documents and other special tools to appeal to young adults
- Identifies and uses a variety of online and print young adult readers' advisory resources to identify materials
- Maintains an ongoing knowledge of major new authors, fiction genres, nonfiction subjects and current releases, including media and genres of particular interest to young adults
- Engages in conversations with young adults to learn and inform future recommendations
- Collaborates with families, schools and other community groups to promote reading and literacy to young adults
- Understands the theories of reading development for young adults and the reading curriculum used by community schools

Young Adult Programming

Designs, implements and sponsors library programs that offer information, special skills or entertainment for young adults

- Uses a variety of methods to determine the interests and developmental needs of young adults in the community (obtains demographic data, surveys users and non-users, follows news and entertainment sources, collects input from frontline staff and community organizations that work with young adults, etc.)
- Involves young adults in planning, implementing and evaluating programs
- Designs a wide variety of programs appropriate to the identified interests and developmental needs of young adults
- Demonstrates creativity, openness to new ideas, knowledge of a variety of tools and techniques and a sense of humor
- Creates and delivers programs and services that allow young adults to continue learning and skill-building outside of school
- Identifies program venues outside of the library that have young adult appeal
- Identifies opportunities for connecting with other organizations that serve young adults and builds strategic partnerships
- Evaluates all programs and uses those results to improve future programs for young adults

Develops and promotes learning spaces and programs for young adults

- Creates young adult spaces that are designed to inspire collaboration and creativity
- Creates and helps sustain an environment in which young adults can "hang out, mess around and geek out" while learning
- Encourages young adults to engage in individual and collaborative work at the library
- Provides interactive programs and resources that foster the development of 21st century skills including creativity, critical thinking, collaboration and communication
- Communicates with local schools and identifies platforms and programs that are being used there so young adults can continue and extend their learning when at the library
- Provides programs and services that enhance literacy, reading and STEM (science, technology, engineering and mathematics) skills
- Provides workshops and other opportunities for young adults to build their technology skills and create digital projects
- Understands the value of games and gaming for young adults and develops gaming programs
- Evaluates the outcomes of young adult programs and services and recommends improvements for future efforts

Technology Competencies: Systems and IT

Technology is now ubiquitous in libraries and IT intersects with all departments. Depending on the size and type of library, there may be strict divisions between the responsibilities of IT staff and other library staff, or the line may be more indistinct as it is for "accidental" systems librarians in small libraries. Certain IT functions may be handled by consultants, too. Find the right combination of competencies from this compilation to meet the needs of your library.

Many aspects of Systems and IT involve coordinated efforts with management. See the Library Management Competencies set for technology planning, technology policies, project management, budgeting and organizational leadership skills.

All IT

As technology increasingly infuses the library environment, clarity of communication between IT experts and all library staff is as important as sound management of technology projects. The ability to explain complex ideas and to listen carefully to users underlies effectiveness in all other systems and IT work.

Supports the library's systems and IT needs through sound project management and clear communication

- Communicates effectively with management and other departments to define needs and parameters for use
- Builds relationships with others and communicates effectively, listening to needs and questions
- Communicates technical information clearly in a way that is appropriate to the listener
- Demonstrates problem-solving, critical thinking and time management skills
- Assesses technology trends that will affect the library and its users and advises all appropriate stakeholders in the organization

Provides training and support for staff on library technologies

- Articulates and demonstrates technical concepts and procedures to all levels of staff
- Aligns technology training with the library's overall objectives and efforts for staff and user training
- Develops and delivers training events, following principles of learning theory and interactivity
- Assists staff in the use of library systems (hardware, software and networks)
- Identifies resources available to users for instruction and training on software applications and other technologies in use
- Provides opportunities for staff to explore new technologies in the library environment

Automation Systems

Providing administration and support of the library automation system (ILS) and understanding the dependencies and workflows among systems are critical to maintaining a functional computing environment.

Demonstrates advanced understanding of the library automation system (ILS)

- Articulates the value and purpose of a library automation system
- Develops effective working relationships with others involved with the ILS, including internal library staff, ILS vendor support and ILS user groups
- Understands the interrelationships and workflows of the various modules of the library's automation system (OPAC, circulation, cataloging, etc.)
- Uses standard or customized reports from the automation system for management of library operations
- Establishes procedures to ensure current backups and regular updates to the automation system; schedules overnight procedures and processes
- Ensures process for maintaining a log of system failures and problems
- Performs regular evaluations of the systems and communicates with the vendor on failure, problems and services
- Demonstrates familiarity with operating and database systems used by the ILS
- Understands and can articulate the functions of software as a service (SaaS) and other hosting arrangements
- Pursues integrated e-book discovery and lending as part of the ILS

Enterprise Computing

Many large libraries operate at the enterprise level of computing—a level of complexity introduced by the need to integrate multiple computer systems (including legacy systems) and networks, and to accommodate access by a variety of remote users.

Performs enterprise computing management to integrate computing systems across a large organization

- Creates network connections among local area networks (LANs), mainframes and stand-alone computers, including legacy environments
- Understands the architecture and scale of the enterprise system
- Delivers hardware and software configurations for a variety of platforms and networks
- Performs life-cycle management of firmware and applications, upgrading or replacing as warranted
- Weighs the benefits and costs of cloud hosting versus local hosting solutions.
- Establishes and maintains an organization-wide e-mail system
- Understands and manages the complexities of operating system upgrades on servers and workstations as appropriate
- Manages multiple vendor relationships and licensing agreements
- Ensures password protection and data security across the organization
- Functions adeptly in basic programming and scripting languages

Performs enterprise-level software management

- Understands and practices software version management
- Defines schedules and implements software upgrade processes
- Understands enterprise systems in use in parent organization and integrates library systems and services where appropriate and efficient
- Understands principles of identity management and integrates the library's need for authentication and authorization with the parent institution's identity management system
- Understands and practices good code distribution by designing and implementing architectures that efficiently distribute processing across available computing resources
- Recognizes when SaaS is a better solution than locally installing software, and develops and maintains effective working relationships with SaaS providers
- Defines and manages processes to track incidents from receipt to resolution

Hardware

Every position in the library depends on the proper installation and reliable functioning of all of the computer equipment. Hardware may include not only PCs, but also Macs, tablets, training lab equipment, digital creation lab equipment and more.

Installs, configures and maintains equipment and peripheral devices

- Understands in detail the functions of the computer hardware, internal components, peripherals and external storage drives
- Performs advanced troubleshooting for computer hardware and peripherals
- Communicates effectively with colleagues to help them gain understanding and basic troubleshooting abilities
- Installs and configures a variety of computer components
- Understands hardware performance and the impact of individual components on performance
- Installs and supports audio and video editing equipment
- Pursues the most effective and efficient ways to obtain technical support
- Isolates, identifies and articulates problems with hardware

Installs, configures and maintains printers and scanners

- Connects printers, including 3D printers, adds printer drivers and configures properties
- Connects scanners, adds scanner drivers and configures properties
- Supports user access to networked printers and scanners
- Implements and supports wireless printing for individuals using their own devices
- Isolates, identifies and articulates problems with printers and scanners

Networking and Security

The network is the electronic nerve center of the library's operations and its intricacy increases with every new technology and new security threat. Keeping the network running smoothly is increasingly important as our dependence on connectivity grows.

Installs, configures and maintains the library's local area networks (LAN)

- Understands network terminology, protocols, addresses and ports
- Identifies and configures the key components for set-up of the local area network (LAN)
- Understands the infrastructure that supports the library's LAN and identifies site-specific network needs
- Identifies the options for network administration of hardware and software
- Understands the operations of client/server and peer-to-peer networks and the advantages of each
- Understands and applies the principles of user ID and account management schema and tools

Understands and supports the library's telecommunications and wide area networks (WAN)

- Understands the relationship between a LAN (local area network) and a WAN (wide area network)
- Assesses the library's overall Internet connectivity needs and works with appropriate agencies to ensure the long-term sustainability of high-speed connections that meet those needs
- Understands IP authentication and related software for secure network access
- Understands the basic concepts and terminology of telecommunications
- Understands the infrastructure that supports the library's telephony and wide area networks
- Identifies a library's site-specific telecommunication needs and advocates for increased bandwidth when needed
- Collects, analyzes and disseminates network usage data

Installs, configures and maintains the library's wireless networks

- Identifies the library's site-specific factors and their impact on wireless signal transmission
- Identifies the set-up options and the necessary equipment
- Installs and configures the wireless components
- Implements and supports wireless printing for patrons using their own devices
- Applies effective security protocols for all wireless networks

- Identifies equipment needs for individual computers
- Collects, analyzes and disseminates wireless network usage data

Troubleshoots problems with the library's networks in order to maintain optimal operations for staff and users

- Applies strategies to isolate, identify and articulate problems with networks
- Communicates effectively with other library staff and library users in order to identify both isolated and ongoing issues
- Conducts effective technical support interviews
- Locates and uses manuals and FAQs, and contacts appropriate sources for further technical support

Develops and implements practices for network security to ensure maximum protection of library systems and staff and user information

- Understands network security architecture and protocols
- Understands hardware- and software-based security solutions
- Establishes a password management system and maintains secure passwords
- Identifies and communicates potential and real security and privacy threats related to computer and Internet use
- Identifies and implements solutions for addressing security threats such as spam, spyware and viruses
- Identifies and develops a plan for regular and automated security maintenance tasks
- Consults appropriate sources to stay informed of emerging security threats and the most current strategies and tools
- Balances need for security with library values of privacy and intellectual freedom
- Establishes metrics that can be tracked, reported and used to evaluate the effectiveness of services

Operating Systems

Providing administration and support of the operating systems on the library computers and understanding the dependencies and workflows among systems are critical to maintaining a functional computing environment.

Installs, configures and maintains all operating systems functioning in the library environment

- Demonstrates general knowledge of operating systems available for use, including open-source and mobile systems
- Selects, installs and configures appropriate operating systems
- Understands the terminology, specifications and functions of the operating systems in use
- Devises and executes a plan for operating system maintenance and update tasks
- Troubleshoots problems with the operating systems
- Devises and sustains effective back-up strategies
- Understands and executes the process of imaging PCs
- Manages the process for upgrading systems, including determining applications compatibility and planning data migration

Public Access Technology

IT works closely with the public services department to support technology that is available for use by the public. This includes computers, peripherals, the wireless network and more. Providing public access technology creates unique needs for the set-up of the hardware, software, networks and security.

(See also: Public Services > Public Access Technology for competencies for basic troubleshooting and patron assistance.)

Installs and configures the library's public access computers and networks to best meet the needs of library users

- Determines the needs for public access computers, wireless access and programs
- Understands the nature of security threats to a public access system
- Selects and installs appropriate computer, networking and peripheral hardware for public use

- Installs and configures appropriate operating systems and software applications for public use
- Selects, installs and configures appropriate public access computer security measures
- Configures public networks to secure and isolate them from nonpublic computers and networks
- Selects, installs and configures access, bandwidth and content restriction measures as directed by library policy
- Identifies and implements options for reservation, time and print management systems
- Applies ADA recommendations for physical and electronic equipment
- Understands pros and cons of open-source vs. proprietary software, and identifies solutions that best meet user needs within organizational resources

Maintains and troubleshoots the library's public computers, networks and security

- Develops and executes plans for maintenance and update tasks of public computer hardware, operating systems, security and applications
- Tracks and maintains software licenses to ensure currency
- Keeps current of advances in tools and applications of benefit to users and determines the implications of deploying them on the public computers

Develops, implements and communicates policies and practices for public access computing

- Establishes metrics that can be tracked, reported and used to evaluate the effectiveness of public access technology services.
- Establishes and publishes acceptable use policies for public access computers and wireless networks
- Understands filtering issues in relation to E-Rate and LSTA funds; installs and configures filters as necessary
- Understands the issues related to access to social networking sites and programs
- Balances need for security with library values of privacy and intellectual freedom

Server Administration

The complexity of computer networks breeds an increasing array of servers to deliver particular services to users. It may be necessary to select, configure and/or maintain any of a variety of server types appropriate to the library's needs.

Configures and maintains the library's e-mail servers

- Understands the terminology and protocols of e-mail systems, including SaaS cloud-hosting solutions
- Identifies and configures the key components for set-up of the e-mail server
- Applies appropriate and effective security protocols for e-mail transmission

Configures and maintains the library's Web servers

- Understands the terminology and protocols of Web servers
- Identifies and configures the key components for set-up of the Web server (including static and dynamic content, authentication, log files)
- Determines whether local hosting or remote hosting is best for the organization
- Ensures Web server security

Configures and maintains the library's file servers

- Understands the terminology and protocols of file servers
- Identifies and configures the key components for set-up of the file server (including storage, response time, access and security)
- Recognizes benefits and drawbacks of cloud based storage

Configures and maintains the library's print servers

- Understands the terminology and protocols of print servers
- Identifies and configures the key components for set-up of the print server to host shared printers and process print requests over a network
- Ensures print server security

Configures and maintains the library's database servers

- Understands the terminology and protocols of database servers
- Identifies and configures the key components for set-up of the database server
- Recognizes when cloud-based hosting is a better solution than locally hosting a server

Configures and maintains the library's other servers as needed

- Identifies and configures other server types as needed (DNS, fax server, game server, proxy server, sound server, Web feed server)

Software Applications

Different positions in the library require varying levels of proficiency with software applications, depending on which tasks need to be accomplished. IT ensures that software is properly installed, licensed and ready to run when a user needs it.

(Note: Many beginner-level technology competencies are in the Core Competency set.)

Administration of Software Applications

Manages software applications for staff and other nonpublic computers

- Evaluates and selects software applications appropriate for staff and other users
- Installs and configures software applications
- Isolates, identifies and articulates problems with software applications
- Understands and manages licensing for all software applications
- Understands open-source options for software in libraries

Provides administration for optimum performance of software applications

- Monitors and implements procedures to improve performance
- Implements measures to secure, back up, restore and repair information
- Implements methods for sharing information

Database Application Proficiency

Demonstrates beginner-level proficiency with database applications

- Creates a basic database and accesses different views of the data
- Creates and modifies tables, relational tables and forms
- Runs basic queries and reports on data

Demonstrates intermediate to advanced proficiency with database applications

- Designs a database to meet specified needs and identifies the data relationships
- Applies advanced processes for retrieving and validating data
- Applies advanced manipulations of tables and forms
- Applies advanced methods for queries and reports on data

Document Management Program Proficiency

Demonstrates appropriate level of proficiency with document management programs (SharePoint, for example)

- Understands the file and workspace structure of the document management system
- Adds new files, retrieves existing files, checks files in/out and edits files
- Understands and uses collaboration and information-sharing features

Electronic Publishing Program Proficiency

Demonstrates beginner-level proficiency with electronic publishing applications

- Creates or opens files, chooses layouts and saves files
- Inserts and manipulates text blocks and tables
- Inserts and manipulates graphical shapes, images and clip art
- Understands and applies the printing options

Demonstrates intermediate to advanced proficiency with electronic publishing applications

- Works with page masters and advanced layout configurations
- Applies advanced techniques to text blocks, tables, paths and graphics

- Creates customized publications, including books with table of contents and index
- Optimizes publications for a variety of output options, including the Web and commercial printing

E-mail Program Proficiency

Demonstrates beginner-level proficiency with e-mail programs

- Receives, opens, forwards as needed or deletes e-mail messages
- Composes or replies to, addresses and sends e-mail messages
- Sends, receives and saves attachments
- Manages addresses/contacts
- Creates folders and files messages for retrieval as needed
- Identifies and uses Web-based e-mail programs as well as desktop e-mail applications

Demonstrates intermediate proficiency with e-mail programs

- Performs calendar operations to manage meetings and appointments
- Configures rules, alerts and junk mail settings
- Uses tasks, notes and journal features
- Performs basic page set-up and print operations

Demonstrates advanced proficiency with e-mail programs

- Manages e-mail archiving and data security
- Uses remote access, instant messaging, fax and voice-mail features
- Uses advanced features to manage contacts
- Uses advanced calendar features to manage meetings and group schedules
- Performs advanced printing operations

Photo-editing Program Proficiency

Demonstrates beginner-level proficiency with photo-editing programs

- Opens, saves and prints images
- Resizes, crops, uses basic selection tools and performs basic color and contrast adjustments
- Reverses changes made to an image

Demonstrates intermediate to advanced proficiency with photo-editing programs

- Uses the array of tools in the toolbox and image adjustment options
- Uses a variety of detailed selection options
- Uses layers, creates montages and applies special effects
- Optimizes image for a variety of output options

Presentation Program Proficiency

Demonstrates beginner-level proficiency with presentation programs (Microsoft PowerPoint, for example)

- Creates, opens, runs and saves a basic presentation slide set
- Applies slide designs, layouts and basic formatting
- Inserts images, clip art and charts and modifies as needed
- Understands and applies the printing options

Demonstrates intermediate to advanced proficiency with presentation programs

- Creates and applies custom themes or templates and manages slide masters
- Applies slide transitions, custom animations and action buttons
- Applies advanced manipulation of images, clip art and charts
- Inserts hyperlinks, sound clips and video clips; records narration
- Optimizes presentations for a variety of output options, including the Web or automated kiosk display

Spreadsheet Program Proficiency

Demonstrates beginner-level proficiency with spreadsheet programs

- Understands the basic structure of workbooks, worksheets, rows and columns
- Enters, saves, edits, finds and replaces, and filters data and text
- Inserts rows, columns and worksheets
- Copies and moves cells and worksheets
- Applies basic formatting to cells

Demonstrates intermediate proficiency with spreadsheet programs

- Applies a variety of formatting options (number, date, etc.)
- Manages page settings, previews and print areas
- Inserts hyperlinks, objects and images
- Uses formulas and functions; finds maximum and minimum values
- Creates basic charts to display worksheet data

Demonstrates advanced proficiency with spreadsheet programs

- Applies advanced formulas and functions
- Performs advanced data analysis (pivot tables, pivot charts, goal seek, scenarios)
- Applies advanced number and condition formatting
- Applies advanced data management (sorts, filters and consolidates; applies mathematical, text and database functions)
- Creates, edits and runs macros
- Imports and exports data
- Applies validation, protection and collaboration options

Web-based Application Proficiency

Demonstrates proficiency with Web-based applications for online collaboration

- Understands the advantages of using Web-based applications for collaboration
- Identifies and selects appropriate Web-based application tools (Google Drive, Google Apps, Zoho Apps, SlideShare, etc.)
- Identifies and uses help menus, tutorials and support communities to acquire the necessary skills

Website Design Program Proficiency

Demonstrates beginner-level proficiency with website design programs

- Edits and organizes website content
- Inserts and manipulates links, images, graphics and tables
- Understands and can edit basic HTML tags

(See the Website Design and Development section for more advanced proficiencies)

Word Processing Program Proficiency

Demonstrates beginner-level proficiency with word processing programs

- Creates, opens and saves files
- Selects, cuts, copies, pastes or deletes text
- Performs operations to structure, format, spell-check and print documents

Demonstrates intermediate proficiency with word processing programs

- Inserts header, footer and page numbers
- Inserts and formats columns and tables
- Creates and applies styles
- Inserts and manipulates images, charts and graphs
- Formats and prints envelopes and labels

Demonstrates advanced proficiency with word processing programs

- Creates and uses master documents
- Creates and formats footnotes, endnotes and a table of contents
- Uses advanced features for formatting pages and tables
- Creates and uses macros, forms, frames and controls
- Understands and uses document security and collaboration features

Technology Planning

Technology planning is closely tied to the library's overall strategic plans. Thoughtful planning ensures that decisions are based upon a solid understanding of community needs.

Formulates and implements an ongoing technology planning process

- Evaluates opportunities and requirements for expanded or new technology-based services based on organizational priorities and community needs
- Establishes clear priorities for technology plans that align with the library's ongoing operations and strategic plan and the needs of the community

- Identifies key players to form a productive technology planning team and orients the team with pertinent and current information and training
- Collects relevant data (inventories of hardware and software, licensing requirements, subscription fees, upgrade and replacement requirements) and defines the criteria for upgrading or purchasing new equipment
- Establishes sources and contacts (both inside and outside the library sphere) to keep abreast of emerging technologies and how they impact library technology planning
- Balances risk-taking with realism and alignment with library's priorities

Develops and maintains a library technology plan that meets current and future needs of the library community

- Investigates and analyzes the needs of the community and environment to understand current and future needs and trends
- Creates appropriate goals, objectives and activities that reflect analysis of community needs
- Strives for compatible and stable systems and configurations for maximum reliability
- Develops and applies evaluation measures that gauge the success of the plan
- Anticipates and predicts changes, trends and influences to effectively allocate resources and implement appropriate library technology initiatives
- Incorporates ergonomics into technology facilities planning (placement of computer components, table height, chair adjustments)
- Reviews and updates technology plan and goals annually

Develops strategies and processes for purchasing technology for the library

- Prepares the budget for purchase recommendations based on the technology plan, factoring in total cost of ownership
- Considers open source software options
- Adheres to the library's established rules and procedures for purchasing, including procurement rules and bidding processes
- Establishes and adheres to a hardware replacement plan with a 3–5 year refresh cycle
- Establishes and adheres to a software upgrade plan with a 3–5 year refresh cycle
- Prepares a Request for Proposal (RFP) to support sound purchase decisions
- Identifies and negotiates with technology vendors to obtain products and equipment that best meet the needs of the users

- Leverages consortia and statewide procurement options

- Maintains accurate records of transactions, specifications and standards

- Understands the processes for and implications of applying for government funding programs (E-Rate, LSTA, Universal Service discounts)

Web Design and Development

A library's website is a virtual branch, providing access to services, resources and programming. Website development teams plan, develop and maintain the web-site in collaboration with many other departments, including Marketing, Reference, Readers' Advisory and more.

Designs a website for the library to provide virtual, 24/7 access to a portion of library services

- Understands the concept of a virtual branch and the importance of having a website for the library

- Understands and applies best practices for writing for the Web

- Understands the basic criteria for designing and hosting websites

- Designs the user interface according to principles of usability and accessibility

- Conducts and analyzes website usability tests

- Understands privacy policies, user agreements and intellectual freedom principles and how they impact library website content and services

Implements and updates the library website

- Checks website links and updates content at least monthly

- Performs a content inventory of the library website at least annually

- Demonstrates proficiency with content management and/or website management systems

- Demonstrates proficiency with website design software

- Understands and applies the basic elements of HTML and HTML5 code

- Understands the function of CSS and style sheets

- Investigates emerging technologies for their potential to enhance delivery of information and services through the website

Applies advanced Web technologies to the development of a library website

- Understands the architecture, protocols and terminology of the Internet
- Uses appropriate scripting languages and applies standards for creating valid code to add functionality to the website
- Evaluates and selects appropriate website management software
- Writes code to ensure the usability and accessibility of the user interface
- Uses responsive design to build a single website that adapts to desktop, tablet and smartphone environments
- Uses graphic design principles to ensure effective communication and aesthetic appeal of the library's website
- Uses information architecture principles to guide organization of library website
- Understands and applies principles of user experience (UX)
- Understands and employs multimedia formats
- Builds dynamic pages with database integration
- Collects and analyzes tracking of site statistics

Implements and manages the library's presence on the Web to place the library's services in the path of the users

- Understands the importance of having a Web presence beyond the library website
- Develops the library's presence on social networking sites (Facebook, Twitter, YouTube, etc.)
- Develops and implements plans for regular and sustained engagement with users through the library's social networking accounts
- Applies best practices for attracting users' attention and encouraging interaction through social networking accounts
- Monitors usage and effectiveness of the library's social networking accounts
- Evaluates and implements widgets and other tools for extending online access to library content

Demonstrates proficiency with video and audio production programs

- Records, transfers and edits video or audio files
- Understands format options for video or audio files
- Stores and displays video or audio files

OCLC WebJunction®
The learning place for libraries.

WebJunction's vision is to be the place where the worldwide library profession gathers to build the knowledge, skills, and support they need to power relevant, vibrant libraries. Our mission is to bridge the barriers to learning by providing open, affordable online learning communities.

OCLC®