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To: Waukesha Public Library Board of Trustees
From: Karol Kennedy, Bridges Library System Director
Re: Waukesha County Library Standards Certification
Date: May 3, 2021

Wisconsin Statute 43.64(2) allows Waukesha County municipalities that tax their residents for libraries the opportunity to exempt their residents from the county library levy if two criteria are met:

- 1) The municipal tax rate for library services is equal to or greater than the rate of the county library tax, and
- 2) The library meets or exceeds the Waukesha County adopted library standards.

Exemption from the county library tax, therefore, includes two distinct actions. The municipality action required is a certification of its library tax rate. That process begins when I send out a communication to the municipality after the state releases its official Equalized Assessed Values in mid-August.

The library action requires the library board to review the information in this letter and certify the library's compliance with the various standards by completing the form beginning on page 2 of this document and returning it to our office by August 31, 2021.

After a year-long planning process, the County Board approved new county library standards in 2017. More information is available here: <https://bridgeslibrarysystem.org/waukesha-county-planning-committee-2016-act-150/>. There are numeric *Minimums to Exempt* as well as *Quality Assurance Items* in the new standards. This letter includes your library's specific standards-related requirements.

Please complete the documentation on pages 3-4 and then complete the *Library Board Certification of Eligibility for Exemption from County Library Tax* on page 5. Please **send all pages (with original signatures on page 5) to our office by August 31**. This form constitutes your library's certification for compliance with the library standards portion required for exemption from the Waukesha County library tax levy.

Thank you for providing outstanding library services to the citizens of Waukesha County!

Step 1. Review your Library's Library Service Effort Ratio (LSER) Calculation

There is a provision in the Waukesha County Plan that allows a library to qualify for the exemption without meeting the *Minimums to Exempt*. If a library can demonstrate its ability to provide for most of the needs of its own resident by reaching its targeted Library Service Effort Ratio (LSER), it is allowed to exempt from the county library tax without meeting the numeric *Minimums to Exempt*.

The LSER is calculated as follows:

- Lending by your library to your own residents: 401,514
- PLUS lending to other library community's residents: 39,896
- DIVIDED by total circulation by your residents at all county libraries: 472,327

Your library's LSER is shown in Table 1 below.

Table 1.

Waukesha's Library Services Effort Ratio (LSER)		Eligible for Exemption Based on LSER?
Target	Actual	Pass?
95%	93.45%	No

If your LSER ratio is higher than your listed target rate, you will see a "Yes" in Table 1 above and may skip to step 3 on this form. Please note, even if there is a "YES" listed above, you are encouraged to complete step 2 for the purposes of assessment. However, if your LSER is higher than your required target, step 2 is not required for the purposes of meeting the minimum for the standards portion of the county library tax exemption. If there is a "NO" in Table 1 for your library, you must complete step 2. All libraries must complete step 3.

Step 2: Compare your Library's previous year's data to your Library's *Minimums to Exempt*

Please review the data below gathered from your library's 2020 state annual report and indicate whether your library will meet its minimum requirements in 2021.

Please circle "Yes" or No" in the last column in Table 2. **(Completing this table is required if LSER = "NO" in step 1.)**

Table 2.

Library	Waukesha		2020 Municipal Population	71,952
Category	Minimum to Exempt	Library Actuals from 2020 annual report	Met Minimum during 2020?	Will Meet Minimum in 2021? (Circle one)
Materials Expenditures/Capita	\$5.14/capita	\$6.25/capita	Yes	Yes No
Number Hours Open/Week	60	62	Yes	Yes No
Budgeted Staff in FTE	32.55	45.98	Yes	Yes No
Collection Size	165,500	285,626	Yes	Yes No
Public Computers/Internet Access Devices	41	86	Yes	Yes No
Wireless Internet Access	Yes	Yes	Yes	Yes No

Step 3. Review and Report on Quality Assurance Standards for Waukesha Library
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Review each item and circle "Yes" or "No" in Table 3 below. **(Completing this Table is required regardless of LSER ratio.)**

Table 3.

Quality Assurance Standards	Library Assurance for 2021 (circle one)
Library board member orientations are provided	<div>Yes</div> <div>No</div>
Library website includes key board/staff contact & meeting info	<div>Yes</div> <div>No</div>
Library board conducts director performance evaluation	<div>Yes</div> <div>No</div>
Library budgets for professional development	<div>Yes</div> <div>No</div>
Library has active strategic plan	<div>Yes</div> <div>No</div>

Please attach narrative for any items for which the library circles no and describe steps planned to address the area(s) of non-compliance. Note: For each item in tables 2 and 3, libraries are able to select "No" one time during the annual certification process for the five year planning period.

If your library has circled "no" for an item in a previous year in tables 2 or 3, circling "no" a second time **for that same item** may result in the loss of ability for the municipality to exempt its residents from the county library tax.

Library Board Certification of Eligibility for Exemption from County Library Tax

I certify that the library board's responses related to the *Minimums to Exempt* and *Quality Assurance Standards* were approved by the library board and reflect the library's plan of service for 2021.

Name of Library	Waukesha Library
Date Form Completed:	
Library Board President Name:	
Library Board President Signature:	
Library Director's Signature:	

This form (pages 1-5) must be completed, signed, and submitted to the Bridges Library System no later than **August 31 of this year**.

