

Key: **Level 1 – Emerging library** **Level 2 – Intermediate Library** **Level 3 – Advanced Library**  
**Level 4 – Struggling Library** **Level 5 – Declining Library**

<b>GOVERNANCE</b>	<b>Advisory Board</b>	<b>Level</b>
	<ul style="list-style-type: none"> <li>• What is an Advisory Board? (Appendix - 1) (<a href="http://www.blueavocado.org/content/what-advisory-board-and-should-we-have-one">http://www.blueavocado.org/content/what-advisory-board-and-should-we-have-one</a>)</li> <li>• Advisory Board Candidate and Committee application form (Appendix - 2)</li> <li>• Advisory Board commitment form (Appendix - 3)</li> </ul>	1 1, 2 1, 2
	<b>Governing Board</b>	<b>Level</b>
	<ul style="list-style-type: none"> <li>• By-laws (Appendix - 4)</li> <li>• Mission Examples (Appendix – 5)</li> <li>• Conflict of interest policy (Appendix - 6) <a href="https://www.councilofnonprofits.org/tools-resources/conflicts-of-interest">https://www.councilofnonprofits.org/tools-resources/conflicts-of-interest</a></li> <li>• Roles, responsibilities and legal duties (Appendix - 7)</li> <li>• Board and Advisory Board Candidate and Committee Application form (Appendix – 2)</li> <li>• Board Member and Advisory Board Commitment form (Appendix – 3)</li> <li>• Board Committees (Appendix - 8)</li> </ul>	1 1, 2, 3 1, 2 1 1, 2 2 2
	<b>Friends of Library</b>	<b>Level</b>
	<ul style="list-style-type: none"> <li>• General definition <a href="http://www.ala.org/united/friends/orgtools">http://www.ala.org/united/friends/orgtools</a></li> <li>• Memorandum of Understanding (Appendix - 9)</li> </ul>	2, 3 2, 3
	<b>Library Foundations</b>	<b>Level</b>
	<ul style="list-style-type: none"> <li>• <a href="http://www.ala.org/united/foundations/orgtools">http://www.ala.org/united/foundations/orgtools</a></li> <li>• <a href="https://trust.guidestar.org/blog/2013/12/04/how-library-foundations-are-helping-public-libraries/">https://trust.guidestar.org/blog/2013/12/04/how-library-foundations-are-helping-public-libraries/</a></li> <li>• <a href="http://www.foundationlibraries.info">http://www.foundationlibraries.info</a></li> <li>• <a href="https://www.cof.org/content/consortium-foundation-libraries">https://www.cof.org/content/consortium-foundation-libraries</a></li> </ul>	3, 4 3, 4 3, 4 3, 4
	<b>Consortium</b>	<b>Level</b>
	<ul style="list-style-type: none"> <li>• Definition of a Library Consortium (Appendix - 10)</li> <li>• <a href="http://icolc.net/consortia">http://icolc.net/consortia</a></li> </ul>	2, 3 2, 3
<b>Resources</b>	<b>Level</b>	
<ul style="list-style-type: none"> <li>• <a href="https://boardsource.org">https://boardsource.org</a></li> <li>• <a href="https://www.saplf.org">https://www.saplf.org</a></li> </ul>		

# HUMAN CAPITAL MANAGEMENT

<b>Human Resources Compliance / Key HR Policies</b>		
<ul style="list-style-type: none"> <li>• <a href="https://twc.texas.gov/news/efte/atoz_introduction.html">https://twc.texas.gov/news/efte/atoz_introduction.html</a></li> <li>• Harassment (Appendix 11, 12 and <a href="http://SHRM.com">SHRM.com</a> website)</li> <li>• Equal Opportunity Employment (Appendix – 13 and <a href="http://SHRM.com">SHRM.com</a>)</li> <li>• Texas Employment laws to know and follow to ensure compliance: <a href="https://twc.texas.gov/news/efte/efte.pdf">https://twc.texas.gov/news/efte/efte.pdf</a></li> </ul>		1, 2, 3, 4, 5 1, 2, 3 1, 2 1, 2, 3, 4, 5
<b>Human Resources Compliance / Job Descriptions</b>		
<ul style="list-style-type: none"> <li>• <a href="https://www.webjunction.org/explore-topics/job-descriptions.html">https://www.webjunction.org/explore-topics/job-descriptions.html</a></li> <li>• <b>Samples</b> <a href="https://www.webjunction.org/explore-topics/job-descriptions/documents.html">https://www.webjunction.org/explore-topics/job-descriptions/documents.html</a></li> </ul>		1, 2, 3 1, 2, 3
<b>Human Resources Compliance / Onboarding</b>		
<ul style="list-style-type: none"> <li>• <a href="https://www.smartsheet.com/free-onboarding-checklists-and-templates">https://www.smartsheet.com/free-onboarding-checklists-and-templates</a></li> <li>• <a href="https://business.linkedin.com/content/dam/business/talent-solutions/global/en_us/c/pdfs/onboarding-in-a-box-v03-06.pdf">https://business.linkedin.com/content/dam/business/talent-solutions/global/en_us/c/pdfs/onboarding-in-a-box-v03-06.pdf</a></li> <li>• Onboarding in a Box (Appendix - 14)</li> <li>• <a href="https://onlinetraining.tsl.texas.gov/course/view.php?id=130">https://onlinetraining.tsl.texas.gov/course/view.php?id=130</a></li> </ul>		2, 3 2, 3 2, 3 2, 3 2, 3
<b>Performance Management / Performance Appraisal</b>		
<ul style="list-style-type: none"> <li>• 90-day review template (Appendix - 15)</li> <li>• <a href="https://www.smartsheet.com/free-onboarding-checklists-and-templates">https://www.smartsheet.com/free-onboarding-checklists-and-templates</a> (90 day review template)</li> <li>• Annual review template (Appendix - 16)</li> <li>• <a href="https://www.smartsheet.com/free-employee-performance-review-templates">https://www.smartsheet.com/free-employee-performance-review-templates</a> (annual review template)</li> <li>• <a href="https://employee-performance.com/blog/category/reviews">https://employee-performance.com/blog/category/reviews</a></li> </ul>		1, 2, 3 2, 3 2, 3, 4 2, 3, 4 2, 3, 4
<b>Performance Management / Performance Improvement</b>		
<ul style="list-style-type: none"> <li>• <a href="https://www.shrm.org/resourcesandtools/tools-and-samples/how-to-guides/pages/performanceimprovementplan.aspx">https://www.shrm.org/resourcesandtools/tools-and-samples/how-to-guides/pages/performanceimprovementplan.aspx</a></li> <li>• <a href="https://www.shrm.org/resourcesandtools/legal-and-compliance/employment-law/pages/12-tips-for-handling-employee-terminations.aspx">https://www.shrm.org/resourcesandtools/legal-and-compliance/employment-law/pages/12-tips-for-handling-employee-terminations.aspx</a></li> </ul>		2, 3, 4, 5 2, 3, 4, 5

	<b>Team Building / High-Performing Teams</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://www.tablegroup.com">https://www.tablegroup.com</a></li> <li>• <a href="https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/developingandsustaininghigh-performanceworkteams.aspx">https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/developingandsustaininghigh-performanceworkteams.aspx</a></li> </ul>	2, 3, 4, 5 2, 3, 4, 5
	<b>Team Building / Enhancing Communications</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://www.discprofile.com">https://www.discprofile.com</a></li> </ul>	1, 2, 3, 4, 5
	<b>Team Building / Effective Team Meetings</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://pmbasics101.com/ultimate-guide-effective-team-meeting/">https://pmbasics101.com/ultimate-guide-effective-team-meeting/</a></li> <li>• <a href="https://managementhelp.org/misc/meeting-management.htm">https://managementhelp.org/misc/meeting-management.htm</a></li> <li>• <a href="http://projectmanagementhacks.com/meeting-tips/">http://projectmanagementhacks.com/meeting-tips/</a></li> </ul>	1, 2, 3, 4, 5
<ul style="list-style-type: none"> <li>• Equal Employment Opportunity Commission <a href="http://www.eeoc.gov">www.eeoc.gov</a></li> <li>• Texas Workforce Commission: <a href="http://twc.texas.gov">twc.texas.gov</a></li> <li>• Society for Human Resource Management: <a href="http://shrm.org">shrm.org</a></li> <li>• HR.com: <a href="http://hr.com">hr.com</a></li> <li>• Texas Workforce Commission Texas Employers Manual Handbook (<a href="https://twc.texas.gov/news/efte/efte.pdf">https://twc.texas.gov/news/efte/efte.pdf</a>)</li> </ul>		

TECHNOLOGY	<b>Best Practice Trends</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://americanlibrariesmagazine.org/2017/05/01/top-library-tech-trends/">https://americanlibrariesmagazine.org/2017/05/01/top-library-tech-trends/</a></li> </ul>	2, 3, 4
	<b>Remote Meetings and Collaboration</b>	
	<ul style="list-style-type: none"> <li>• <a href="http://www.join.me">www.join.me</a></li> <li>• <a href="http://www.gotomeeting.com">www.gotomeeting.com</a></li> <li>• <a href="http://www.zoom.us">www.zoom.us</a></li> <li>• <a href="http://www.Skype.com">www.Skype.com</a></li> <li>• <a href="http://www.webex.com">www.webex.com</a></li> <li>• <a href="https://www.smartsheet.com">https://www.smartsheet.com</a></li> </ul>	2, 3, 4
	<b>Technology Plan</b>	
	<ul style="list-style-type: none"> <li>• Technology Plan Templates (Appendix – 17, 18)</li> <li>• <a href="http://www.baylor.edu/business/mis/nonprofits/doc.php/192140.pdf">www.baylor.edu/business/mis/nonprofits/doc.php/192140.pdf</a></li> <li>• <a href="http://www.ala.org/pla/resources/tools/technology-website-development">http://www.ala.org/pla/resources/tools/technology-website-development</a></li> </ul>	3, 4

	<b>Tech Resources</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://www.techsoup.org/cloud-experts">https://www.techsoup.org/cloud-experts</a></li> </ul>	

<b>MARKETING &amp; COMMUNICATIONS</b>	<b>Marketing Plans</b>	
	<ul style="list-style-type: none"> <li>• Marketing plan templates (Appendix)</li> </ul>	2, 3, 4
	<ul style="list-style-type: none"> <li>• <a href="https://www.smartsheet.com/free-marketing-plan-templates-excel">https://www.smartsheet.com/free-marketing-plan-templates-excel</a></li> </ul>	2, 3, 4
	<ul style="list-style-type: none"> <li>• <a href="https://smallbiztrends.com/2008/06/one-page-marketing-plan.html">https://smallbiztrends.com/2008/06/one-page-marketing-plan.html</a></li> </ul>	2, 3, 4
	<b>Marketing Strategies</b>	
	<ul style="list-style-type: none"> <li>• <a href="http://www.ala.org/pla/resources/tools/public-relations-marketing/marketing-strategies">http://www.ala.org/pla/resources/tools/public-relations-marketing/marketing-strategies</a></li> </ul>	2, 3, 4
<b>Public Relations</b>		
<ul style="list-style-type: none"> <li>• <a href="http://www.ala.org/advocacy/advocacy-university/public-relations-dealing-media">http://www.ala.org/advocacy/advocacy-university/public-relations-dealing-media</a></li> </ul>	2, 3, 4	

<b>DATA COLLECTION, MANAGEMENT, ANALYTICS</b>	<b>Data Analytics</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://www.webjunction.org/search-results.html?q=data%20collection">https://www.webjunction.org/search-results.html?q=data%20collection</a></li> </ul>	2, 3, 4
	<ul style="list-style-type: none"> <li>• <a href="http://musingsaboutlibrarianship.blogspot.com/2016/11/5-reasons-why-library-analytics-is-on.html">http://musingsaboutlibrarianship.blogspot.com/2016/11/5-reasons-why-library-analytics-is-on.html</a></li> </ul>	2, 3, 4
	<b>Systems</b>	
<ul style="list-style-type: none"> <li>• <a href="http://www.join.me">www.join.me</a></li> <li>• <a href="http://www.gotomeeting.com">www.gotomeeting.com</a></li> <li>• <a href="http://www.zoom.us">www.zoom.us</a></li> <li>• <a href="http://www.Skype.com">www.Skype.com</a></li> <li>• <a href="http://www.webex.com">www.webex.com</a></li> <li>• <a href="https://www.smartsheet.com">https://www.smartsheet.com</a></li> </ul>	2, 3, 4	

<b>BUDGET &amp; FINANCE</b>	<b>Finance Policies</b>	
	<ul style="list-style-type: none"> <li>Accounting Policies and Procedures Sample Manual (Appendix - 20)</li> <li><a href="http://www.blueavocado.org/content/five-internal-controls-very-small-nonprofit">http://www.blueavocado.org/content/five-internal-controls-very-small-nonprofit</a></li> </ul>	1, 2, 3, 4
	<b>Budgeting</b>	
	<ul style="list-style-type: none"> <li><a href="http://www.ala.org/tools/atoz/librarybudgetfinance/budgetfinance">http://www.ala.org/tools/atoz/librarybudgetfinance/budgetfinance</a></li> </ul>	1, 2, 3, 4

<b>ADMINISTRATIVE SYSTEMS / BEST PRACTICES</b>	<b>Strategic Planning</b>	
	<ul style="list-style-type: none"> <li><a href="http://www.ala.org/united/sites/ala.org.united/files/content/trusteezone/practical-guides/strategic-planning.pdf">http://www.ala.org/united/sites/ala.org.united/files/content/trusteezone/practical-guides/strategic-planning.pdf</a></li> </ul>	3, 4
	<ul style="list-style-type: none"> <li><a href="https://www.smartsheet.com/free-strategic-planning-templates">https://www.smartsheet.com/free-strategic-planning-templates</a></li> <li><a href="https://www.forbes.com/sites/davelavinsky/2013/10/18/strategic-plan-template-what-to-include/#501e07ca47e1">https://www.forbes.com/sites/davelavinsky/2013/10/18/strategic-plan-template-what-to-include/#501e07ca47e1</a></li> </ul>	3, 4
	<b>Operations Plan</b>	
	<ul style="list-style-type: none"> <li>Operations Plan template (Appendix - 21)</li> <li><a href="https://www.smartsheet.com/develop-plan-action-free-templates">https://www.smartsheet.com/develop-plan-action-free-templates</a></li> </ul>	1, 2, 3 1, 2, 3
	<b>Emergency Planning</b>	
	<ul style="list-style-type: none"> <li>Emergency Action Plan (Appendix - 22)</li> <li>Crisis Management Plan (Appendix - 23)</li> <li><a href="https://learn.webjunction.org/course/search.php?search=Active+Shooter">https://learn.webjunction.org/course/search.php?search=Active+Shooter</a></li> </ul>	2, 3, 4 2, 3, 4 2, 3, 4
	<b>Polices &amp; Procedures</b>	
	<ul style="list-style-type: none"> <li>Polices templates (Appendix – 24 can be used for polices or procedures. Use different numbering)</li> <li>Procedures templates (Appendix - 24)</li> <li>Gift Acceptance Policy (Appendix) -25</li> </ul>	2, 3, 4 2, 3, 4 2, 3, 4, 5
	<b>Sample Policies</b>	
	<ul style="list-style-type: none"> <li><a href="https://www.webjunction.org/explore-topics/policies-procedures/documents.html">https://www.webjunction.org/explore-topics/policies-procedures/documents.html</a></li> </ul>	2, 3, 4, 5
	<b>Library Certification</b>	
	<ul style="list-style-type: none"> <li><a href="http://texreg.sos.state.tx.us/public/readtac\$ext.ViewTAC?tac_view=5&amp;ti=13&amp;pt=1&amp;ch=1&amp;sch=C&amp;rl=Y">http://texreg.sos.state.tx.us/public/readtac\$ext.ViewTAC?tac_view=5&amp;ti=13&amp;pt=1&amp;ch=1&amp;sch=C&amp;rl=Y</a></li> </ul>	1, 2, 3, 4, 5

	<b>Library Standards &amp; Guidelines</b>	
	<ul style="list-style-type: none"> <li>• <a href="http://www.ala.org/tools/guidelines">http://www.ala.org/tools/guidelines</a></li> </ul>	1, 2, 3, 4, 5
	<b>Best Practices Resources</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://americanlibrariesmagazine.org">https://americanlibrariesmagazine.org</a></li> <li>• <a href="http://ideas.demco.com">http://ideas.demco.com</a></li> <li>• <a href="https://www.ifla.org">https://www.ifla.org</a></li> <li>• <a href="http://www.ala.org/tools/">http://www.ala.org/tools/</a></li> <li>• <a href="https://www.tsl.texas.gov">https://www.tsl.texas.gov</a></li> <li>• <a href="https://www.tsl.texas.gov/texshare/databases">https://www.tsl.texas.gov/texshare/databases</a></li> <li>• <a href="https://www.webjunction.org/about-us.html">https://www.webjunction.org/about-us.html</a></li> <li>• <a href="https://managementhelp.org">https://managementhelp.org</a></li> <li>• <a href="https://onlinetraining.tsl.texas.gov">https://onlinetraining.tsl.texas.gov</a></li> </ul>	

<b>FUNDRAISING</b>	<b>Fundraising Basics</b>	
	<ul style="list-style-type: none"> <li>• Grant writing and foundations (Appendix – 25A)</li> <li>• Annual Fund Primer (Appendix - 26)</li> <li>• <a href="http://www.ala.org/advocacy/advleg/frontlinefundraising/annualfund">http://www.ala.org/advocacy/advleg/frontlinefundraising/annualfund</a></li> <li>• Corporate (Appendix - 27)</li> </ul>	3, 4 2, 3, 4 3, 4
	<ul style="list-style-type: none"> <li>• <a href="http://www.ala.org/advocacy/advleg/frontlinefundraising">http://www.ala.org/advocacy/advleg/frontlinefundraising</a></li> </ul>	3, 4
	<b>Fundraising Best Practices</b>	
	<ul style="list-style-type: none"> <li>• <a href="https://www.networkforgood.com/nonprofitblog/category/best-practices/">https://www.networkforgood.com/nonprofitblog/category/best-practices/</a></li> <li>• Donor Centered Fundraising: Penelope Burk: <a href="http://www.burksblog.com">http://www.burksblog.com</a></li> <li>• <a href="https://foundationcenter.org">https://foundationcenter.org</a></li> </ul>	2, 3, 4 2, 3, 4 3, 4
	<b>Resources</b>	
	<ul style="list-style-type: none"> <li>• <a href="http://www.guidestar.org">www.guidestar.org</a></li> <li>• <a href="https://www.networkforgood.com/non-profit-fundraising-resources/">https://www.networkforgood.com/non-profit-fundraising-resources/</a></li> <li>• <a href="https://www.councilofnonprofits.org/tools-resources-categories/fundraising">https://www.councilofnonprofits.org/tools-resources-categories/fundraising</a></li> <li>• <a href="http://www.afpnet.org">http://www.afpnet.org</a></li> <li>• <a href="http://www.ala.org/tools/atoz/fundraising/fundraising">http://www.ala.org/tools/atoz/fundraising/fundraising</a></li> </ul>	

MAKER SPACES	Maker Spaces	
	<ul style="list-style-type: none"> <li>• Makerspace Toolkit (Appendix - 28)</li> <li>• <a href="http://www.ala.org/pla/resources/tools/technology-website-development/makerspaces-technologies">http://www.ala.org/pla/resources/tools/technology-website-development/makerspaces-technologies</a></li> <li>• <a href="http://yalsa.ala.org/blog/2015/10/14/looking-to-create-a-makerspace-in-your-library-here-are-some-ideas/">http://yalsa.ala.org/blog/2015/10/14/looking-to-create-a-makerspace-in-your-library-here-are-some-ideas/</a></li> </ul>	<p>2, 3, 4</p> <p>2, 3, 4</p> <p>2, 3, 4</p>