

WVLS Board Member Email

Notes for Review and Training

WVLS Board Member email became an internally managed service in fall 2015. Accounts for standing board members are created and maintained in Office 365 under the [wvls.lib.wi.us](#) domain using the [New Trustees - Credentials Checklist](#) template (in SmartSheet).

In the past, WVLS staff garnered personal email addresses from board members, and maintained various lists (some “official” some used by individual staff members) including that info. The management of personal addresses itself is not terribly challenging, though it can be more prone to error than a managed service model. One of the major factors influencing the move was the ability to offer segregation of public communications, subject to public records law, to trustees. Managing primary accounts, even if they are only used to forward communications to personal accounts, gives WVLS more control over records retention and retrievability with trustee communications related to WVLS business.

In order to fully leverage the managed service model, eventually WVLS will need to graduate trustees from a hybrid model - that is, forwarding email from the “work” accounts to the “personal accounts” - to a “work” account only model. Ultimately, pure utilization of a managed service model would maximize staff <-> trustee communications efficiency, but accurate and thorough records retention is still the larger factor.

Review:

- [WVLS Primary Email Groups](#)
- WVLS Staff <-> Trustee Communications Flows visual
- [WVLS Board Member Directory](#)

To help maintain consistency in email communications with WVLS Trustees, WVLS Staff should always:

- Send all new business-related email correspondence only to Trustees’ “work” accounts.
- Use the wvls.trustees@wvls.org email group for all general information sharing and business-related correspondence to trustees, except in cases where direct correspondence with an individual trustee, or small group of individual trustees is appropriate (eg. the WVLS Director corresponding with the Board President regarding the next meeting agenda).
- Use an individual trustee’s <trustee>@wvls.lib.wi.us “work” email address for business-related correspondence sent directly to that individual trustee.

It would also be helpful if WVLS staff can adopt these additional habits:

- Be mindful of the forwarding communications flow:
WVLS Staff -- original message --> Trustee "Work" Account -- automatic forward --> Trustee "Personal" Account -- reply from trustee --> WVLS Staff
- CC an individual trustee's <trustee>@wvls.lib.wi.us "work" email address on replies to business-related correspondence originating from that trustee's personal account.

Additional notes for updating:

- Records retention awareness
- Walking Quorum mitigation
- WVLS Pub Trustees group bubble - "list migration" "migration of list"
- Update your "personal" contacts for the board members

WVLS All

WVLS Academic

Moderated Membership - Includes Librarians from Academic Institutions within WVLS

WVLS General Interest Group

Open Membership – This group is open to all people interested in WVLS going on. The open membership of this group used to be managed directly in the “All” list. This group was created to ease management of the All group membership.

WVLS K12 Librarians

Moderated Membership – Includes librarians, media specialists, and library workers from K12 institutions. List membership and moderation is managed by Kris.

WVLS Non-Public

Moderated Membership – This group is for a legacy list. The membership is mostly K12 type addresses, and some broken addresses. The relevancy of this group is questionable. The implied intent of the original list was to aggregate staff from library types not covered by the other lists.

WVLS Public Library Directors

Moderated Membership – Includes the directors of each of the Public Libraries in WVLS. There are non-director staff members of this group who were carried over from the migration of the lists. Recommend creating Pub Lib Administrators group and limiting this to directors only.

WVLS Public Library Trustees

Moderated Membership – Includes trustees (and likely former trustees) of various public libraries in WVLS. This is a highly unmanaged group. There are roughly 60 addresses in the group, but I believe many/all of them are carried over from the list migration.

WVLS Public Library Youth Services

Moderated Membership – Includes youth services personnel or those interested in YSS from public libraries in WVLS.

WVLS All Staff

Moderated Membership – Includes current staff members of WVLS.

WVLS Technology

Moderated Membership – Includes persons with direct interest in the WVLS Technology Services Platform. The PL Dirs group and several other public library staff are included. WiLS’ Director is included. IFLS Technology staff are included.

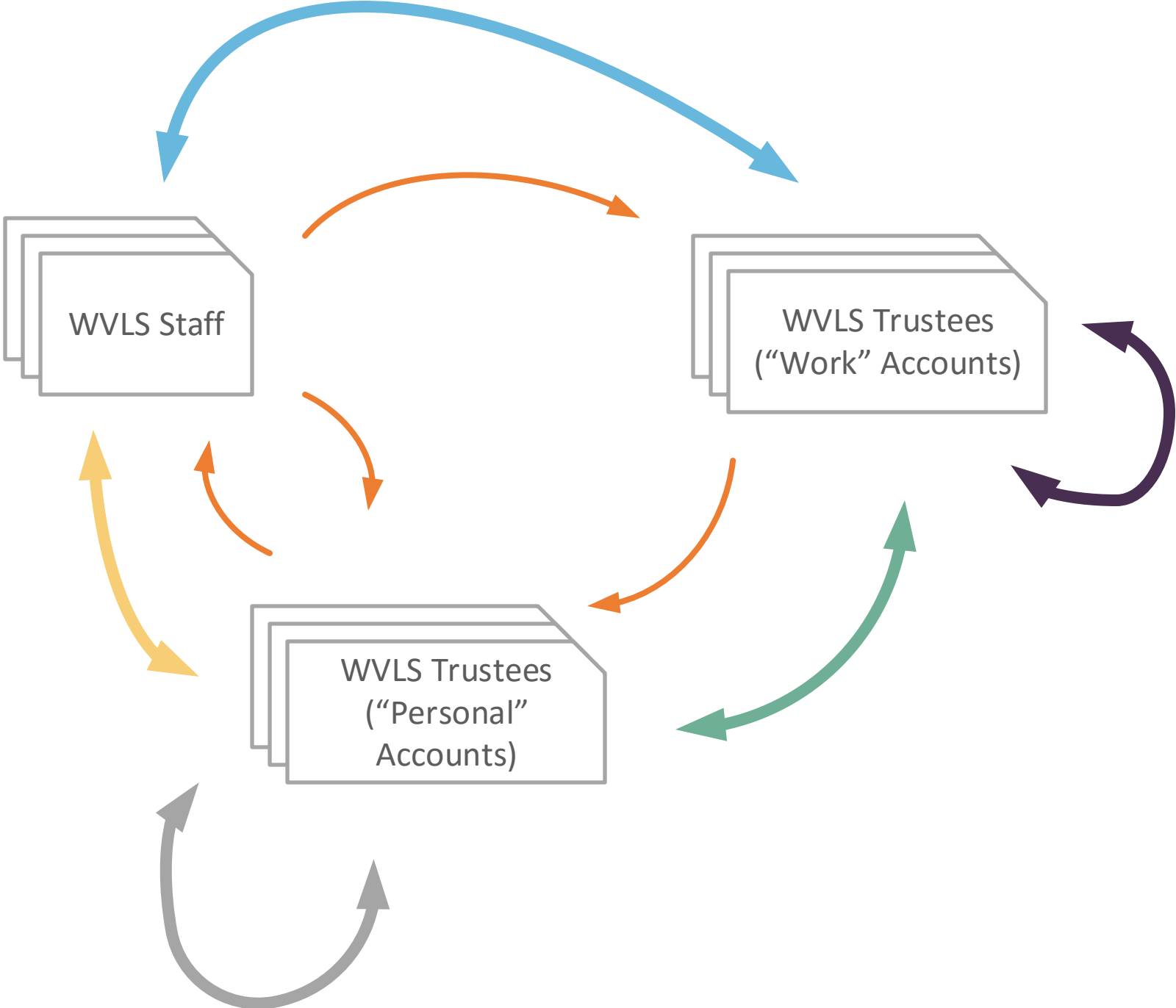
WVLS VCat Users

Moderated Membership – Includes persons with direct interest in the WVLS V-Cat Consortium. The PL Dirs group and several other V-Cat member library staff are included.

WVLS Board of Trustees

Moderated Membership – Includes the WVLS Board of Trustee members (WVLS accounts) and WVLS Staff who regularly facilitate and/or participate in the BoT meetings.

Complexity of Communication Flows



Task Name
<Trustee Name>
<input type="checkbox"/> Active Directory User Account
Create new account
Set default password
<input type="checkbox"/> Office 365 User Account
Create new account <first name>.<last name>@wvls.lib.wi.us
Set default password
Set account to forward (and save) messages to personal account (if trustee prefers)
<input type="checkbox"/> Google Groups
Add <trustee>@wvls.lib.wi.us address to WVLS Trustees group
<input type="checkbox"/> WVLS Trustee Directory
Add Trustee's info to the WVLS Trustee Directory (http://www.wvls.org/board-trustees-members)
<input type="checkbox"/> iPad
Configure JSS with Trustee's AD User.
Configure iPad for Trustee (including Outlook App and WVLS email setup)
<input type="checkbox"/> Orientation
Present configured iPad and charging equipment to Sue Hafemeister
Sue will present the equipment and signatory sheet to new Trustee
<input type="checkbox"/> Provide basic training to Trustee following their first attended meeting.
Include basic iPad use/navigation if Trustee is unfamiliar with iPads/iOS
Include WVLS email access
Include WVLS website access
Encourage Trustee to schedule in depth training with Chris Heitman during office hours
Determine if Trustee would like email forward (if that was configured) to continue from WVLS account to personal account.
<input type="checkbox"/> Cleanup
Remove Trustee's personal account from WVLS Trustees Google group

Wisconsin Valley Library Service

Board of Trustees: Members

First Name	Last Name▲	Phone	E-mail	Role	County	Term Expires
Sonja	Ackerman		sonja.ackerman@wvls.lib.wi.us		Marathon County	12/2018 »
James	Backus		james.backus@wvls.lib.wi.us		Marathon County	12/2016 »
Tom	Bobrofsky		tom.bobrofsky@wvls.lib.wi.us	President	Clark County	12/2017 »
Tyson	Cain		tyson.cain@wvls.lib.wi.us		Marathon County	12/2017 »
Eileen	Grunseth		eileen.grunseth@wvls.lib.wi.us		Taylor County	12/2017 »
Peg	Jopek		peg.jopek@wvls.lib.wi.us		Langlade County	12/2018 »
Paul	Knuth		paul.knuth@wvls.lib.wi.us		Oneida County	12/2016 »
Douglas	Lay		douglas.lay@wvls.lib.wi.us	Vice President	Marathon County	12/2017 »
Louise	Olszewski		louise.olszewski@wvls.lib.wi.us		Clark County	12/2018 »
Michael	Otten		michael.otten@wvls.lib.wi.us	Treasurer	Marathon County	12/2018 »
Pat	Pechura		pat.pechura@wvls.lib.wi.us		Oneida County	12/2017 »
Katie	Rosenberg		katie.rosenberg@wvls.lib.wi.us		Marathon County	12/2016 »
Marilyn	Sauer		marilyn.sauer@wvls.lib.wi.us		Lincoln County	12/2016 »
Alice	Sturzl		alice.sturzl@wvls.lib.wi.us		Forest County	12/2016 »
Elaine	Younger		elaine.younger@wvls.lib.wi.us		Marathon County	12/2018 »

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28 reads