



GENERAL INFORMATION

Library System

Outagamie Waupaca Library System

Describe significant needs and problems that influenced the development of this and other system plans.

The development of the 2021 system plan builds upon previous planning activities and previous plans. While many of the system's needs and problems do not change dramatically from year to year, new issues regularly arise, and ongoing issues experience a shift in focus or urgency. A number of 2021 issues and priorities are described below.

Technology Services

OWLS Technology and Resource Sharing Plan: 2017-2020 contains extensive detail regarding technology service goals, objectives, priorities, and activities. The primary technology goal is to continue providing services and support to OWLS and OWLSnet member libraries that help them increase patron access to library and information resources and that help them increase the efficiency and effectiveness of library operations. OWLS, in consultation with the OWLSnet Administrative Advisory Committee, is in the process of drafting a new Technology and Resource Sharing Plan for 2021-2024, which we expect to have completed in November 2020. The priorities identified in this process have informed the 2021 System Plan.

Resource Sharing and Delivery

OWLS is continuing to use WISCAT to provide resource sharing for our member libraries. OWLS staff provide support and training for using the service while member libraries manage their own requests to and from WISCAT. OWLS will continue to monitor this model and recommend any changes that might improve delivery of service.

OWLS and OWLSnet member libraries support the launch of delivery pilot projects to increase equity of access to rapid, efficient delivery services as recommended in the PLSR report. Toward this end, the OWLS Director is serving on the PLSR Delivery User Advisory Group and will work with neighboring systems to explore the feasibility of a regional delivery hub.

Funding for Nonresident Service

Pursuing adequate and equitable county and intersystem funding for nonresident services continues to be a high priority for OWLS. OWLS libraries provide a high volume of service to non-residents. OWLS libraries have historically circulated more items to people living outside of the system area than do the libraries in any other system.

Excellent progress has been made in achieving equitable county funding. In 2009, county library service plans were developed that called for Outagamie and Waupaca Counties to fund municipal libraries at 100% of their respective funding formulas by the end of the period covered by the plans, i.e., 2014. Both counties were able to achieve this level during the 2014 budget cycle and have continued through the 2019 budget cycle. In 2019, Waupaca County and Outagamie County approved new library service plans for 2020-2024. The plans include reimbursement for electronic circulation.

With the passage of Act 157 in 2014, some of the issues regarding equity are beginning to be addressed. OWLS libraries billed Brown County for nonresident use. Both Brown County and Outagamie County have paid for current usage in 2015-2020. Beginning in 2015, the Marion and Clintonville libraries billed for service provided to Shawano County residents living in areas not served by a library. However, Shawano County became a consolidated county library at the end of 2017, which means that the Marion and Clintonville libraries are now unable to bill for services provided to residents of Shawano County residing outside of municipalities with libraries, which for both libraries represents more than 10% of their total circulation. An intersystem agreement with NFLS provides compensation for a portion of this service.

Calumet County continues to do a commendable job of compensating OWLS libraries for providing service to residents of the County under the intersystem agreement between OWLS and the Manitowoc Calumet Library System, and Waushara County began reimbursing Waupaca County libraries in 2011.

Another problem area is between Portage County and Waupaca County. The Waupaca Area Public Library provides a significant and increasing level of service to Portage County residents, but because Portage County operates a consolidated county library and does not bill adjacent counties, they are not required to pay for the service they receive.

OWLS will continue to monitor these situations and work with member libraries and adjacent library systems to determine the most effective methods for achieving equity in library services between systems, counties and libraries. In addition, OWLS will

GENERAL INFORMATION (cont'd.)

continue to pursue legislative remedies to address inequities should it be deemed appropriate.

Future of Wisconsin Library Systems

Since 2013, OWLS has participated in or monitored a number of statewide processes and discussions relating to ensuring a strong future for Wisconsin's systems, most notably the Public Library System Redesign process. In addition, OWLS has continued to investigate opportunities for collaboration with neighboring systems, counties, and libraries that are mutually beneficial.

OWLS is a participant in the NEWI regional continuing education service, the statewide backup collaboration, and the statewide technology buying pool. We will continue to look for opportunities to expand our collaboration.

Financial Position

While the system's financial position appears to be secure for 2021, OWLS may face significant financial challenges in the future. Aid to public library systems was cut by 10% in 2011 and remained flat through 2017. Although we received a small increase in state aid in 2018 and 2019, it was offset by a decrease in LSTA funding for system technology.

Many library systems have been struggling for several years and have had to cut services to their member libraries. OWLS has made cuts in some programs to maintain core services. Through attrition, staffing has been reduced by one professional position and one support position. If funding is flat or reduced in the next biennium, it will likely be necessary to raise library fees or make significant cuts in programs and services.

In 2021, over half of the OWLS operating budget will come from fees paid for services by libraries. Because the OWLS budget is so dependent on fees, the ability to continue current service levels will also be threatened if local budget cuts affect the ability of member libraries to pay their fees. The fact that 100% of system aids come from the Universal Service Fund, rather than a general purpose revenue (GPR), also places the system aids in further jeopardy because some officials and industry groups don't believe this is an appropriate use of the Fund. The ongoing impact of the COVID-19 pandemic on municipal, county, and state revenues in 2021 and 2022 is of great concern.

OWLS is a tenant in the Appleton Public Library building, and as their new building process unfolds, OWLS anticipates increased facilities costs whether we remain tenants in the new library or find office space elsewhere. Our space needs have changed considerably now that we have the technology infrastructure in place for most staff to work remotely and our ILS is hosted by the vendor. The creation of a regional delivery hub would further reduce our local space needs.

Did the library system consult member libraries in the development of this plan?

- No, the library system did not include member libraries in the development of this plan.
- Yes, the library system included member libraries in the development of this plan.

If yes, describe the planning environment and process for this system plan. Include how member libraries are involved in plan development and review:

This year's plan reflects input from a variety of sources. The OWLS professional staff meet throughout the year to discuss issues important to the future of the system. The professional staff also met individually with staff from the Appleton Public Library, Nicolet Federated Library System, and member libraries on many occasions.

Brown Bag Lunch Meetings are held regularly to give OWLS children's librarians an opportunity to share with each other and with system representatives. The Administrative Advisory Committee of OWLSnet generally meets every other month. Input from the directors, children's librarians, and AAC meetings was considered in the development of the plan.

Due to the pandemic, OWLS conducted weekly meetings of member directors in March through September, and transitioned to monthly meetings in October. Many of the priorities outlined in this plan were derived from those discussions.

The 2021 plan has also been shaped by the planning process for the OWLS Technology and Resource Sharing Plan: 2021 - 2024. We recently completed a survey of OWLSnet libraries to prioritize technology projects.

Lastly, the OWLS Board meets monthly, holding a number of discussions and taking a variety of actions that contributed to the development of this plan.

ASSURANCES (cont.)

Does the library system have a formally appointed advisory committee under Wis. Stat. § 43.17(2m)?

- No, the library system does not have a formally appointed advisory committee.
- Yes, the library system has a formally appointed advisory committee.

If the system appoints an advisory committee under Wis. Stat. § 43.17(2m), describe how the system makes appointments, posts meetings, and how the advisory committee reports to the library system board. Include a list of any additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the Division:

ASSURANCES

The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year 2021. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

Wis. Stat. § 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section it shall ensure that all of the following are provided:

Membership Agreements

- Wis. Stat. § 43.24(2)(a) Written agreements that comply with Wis. Stat. § 43.15(4)(c)4 with all member libraries.
- The system will provide a sample copy of the agreement with a list of all members signing and the dates signed to the Division by January 15. (The system does not need to file multiple copies of the same agreement; only a sample copy of each type of agreement is necessary.)

If the system is providing the sample copy and list of members signing through a publicly available webpage, provide the URL here:

Resource Library Agreement

- Wis. Stat. § 43.24(2)(b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.
- The system will provide a signed copy of the resource library agreement to the Division by January 15.

If the system is providing the resource library agreement through a publicly available webpage, provide the URL here:

Reference Referral, Interlibrary Loan, and Technology

- Wis. Stat. § 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

List ongoing activities related to this requirement:

- OWLS will maintain the database of member library bibliographic records and holdings. The majority of interloan transactions occur between libraries using the OWLSnet shared automation system.
- OWLS and NFLS will continue to provide member libraries and their patrons with access to the other area library catalogs via InfoSoup.
- OWLS and NFLS will continue to provide OWLSnet members with access to electronic resources including Ancestry Library Edition, Tumblebooks, and Newspaper Archive.
- OWLS and NFLS will monitor and make recommendations for addressing any resource sharing inequities that may emerge between systems or between member libraries.
- OWLS will maintain PC time management and print management solutions for public access PCs and wireless devices in the library.
- Following the ILS platform migration completed in August 2020, OWLS will continue to improve workflows and roll out new features.
- OWLS will monitor total network bandwidth usage and upgrade individual libraries with 50MG connections as needed.
- OWLS will continue to facilitate multitype collaboration by continuing some services previously provided by the Fox Valley Library Council, such as insurance for courtesy cards

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

- OWLS will implement the Bibliocommons discovery layer in 2021.
 - OWLS cataloging staff will develop workflows for the new ILS and train libraries to quickly and accurately add new items to the catalog.
 - OWLS will explore developing a data dashboard for quick access to library statistics.
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ASSURANCES (cont'd)

Inservice Training

- Wis. Stat. § 43.24(2)(e) Inservice training for participating public library personnel and trustees.

The Division interprets inservice training to incorporate a range of in-person and virtual continuing education opportunities.

List ongoing activities related to this requirement.

- OWLS will continue to provide orientation and training for new library directors.
- OWLS will continue to provide training or consultation to staff of member libraries in the effective use of system-provided electronic information resources, software, and other technologies.
- OWLS will continue to provide a limited number of scholarships for librarians, staff, and trustees to attend workshops and conferences.
- OWLS will continue to validate and maintain librarian certification records.
- Through the NEWI regional CE agreement, OWLS will continue to offer an appropriate schedule of continuing education workshops and training classes on topics of interest to librarians, staff, and trustees of member and area libraries.
- OWLS will continue to develop training for library staff and patrons on using the new ILS.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

- OWLS will provide training for library staff and patrons on the new Bibliocommons discovery layer.

Identify the names and email addresses of continuing education staff employed by the system for continuing education services:

NEWI staff support at OWLS: Liz Kauth, lkauth@owlsweb.org
 CE Validator: Bradley Shipps, bshipps@owlsweb.org

If the system contracts with another system or entity to plan and conduct continuing education services, list that system or entity and provide a link to, or copy of, the current agreement:

OWLS, NFLS, MCLS have contracted with Winnefox to provide CE to the entire NEWI region in 2020-2022. Joy Schwarz at Winnefox is the primary CE coordinator: schwarz@winnefox.org

Delivery and Communication

- Wis. Stat. § 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

List ongoing activities related to this requirement. For physical delivery reference resources, personnel, and vendors.

- OWLS will continue to contract with a vendor to provide five day a week delivery service to all member libraries.
- OWLS will continue to participate in the statewide delivery service operated by the South Central Library System.
- OWLS will continue to monitor delivery volume and plan any necessary adjustments or modifications to the delivery service.
- OWLS will continue to utilize email, web postings, and Net Support Notify software as its primary methods for rapidly disseminating information to member libraries.
- OWLS will continue to rely on OWLSnet.org and OWLSweb.org, the system websites, to provide a rich variety of relevant content and links helpful to library staff and trustees.
- OWLS will continue to provide web design and hosting services to facilitate the electronic delivery of information from members to their constituents.
- OWLS staff will assist member libraries with posting electronic content contained in local databases on their websites and with contributing digital resources to Recollection Wisconsin.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

The OWLS Director is serving on the PLSR Delivery User Advisory Group, and will work with neighboring systems to explore the feasibility of a regional delivery hub.

Service Agreements

- Wis. Stat. § 43.24(2)(g) Service agreements with all adjacent library systems.

- The system will provide a copy of the agreements to the Division by January 15. The agreements with adjacent systems – including consulting agreements, consortium agreements, etc. – must include a list of all systems signing the agreement.

If the system is providing the service agreements through a publicly available webpage, provide the URL here:

If the system is providing the service agreements through a publicly available webpage, provide a brief description of the types and number of agreements here:

ASSURANCES (cont'd)

Other Types of Libraries

- Wis. Stat. § 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
- The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. The system will provide a copy of the agreement with a list of all signing libraries to the Division by January 15.

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide the URL here:

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide a brief description of the types and number of agreements here:

Library Technology and Resource Sharing Plan

- Wis. Stat. § 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
- The system will provide the current plan for library technology and resource sharing to the Division by January 1, 2021, if the system amended the plan since last submitting it to the Division or if the plan on file with the Division is no longer valid. See [the Library System Technology and Resource Sharing plan webpage](#) for the most current version of the system library technology and resource sharing plan.

If the system is providing the current technology and resource sharing plan through a publicly available webpage, provide the URL here:

Is the plan current and comprehensive for the technology and resource sharing services the system provides?

- Yes, the library system technology and resource sharing plan is current and comprehensive for the technology and resource sharing services the system provides.
- No, the library system technology and resource sharing plan is not current or comprehensive for the technology and resource sharing services the system provides or will provide.

If no, describe what the system has added, changed, or eliminated from the plan in effect (and describe how the changes were reviewed with member libraries and approved by the system board):

Indicate new or priority activities relating to this requirement for the plan year:

Our Technology and Resource Sharing Plan expires at the end of 2020, and we will soon be concluding a new planning process involving all stakeholders.

Professional Consultation

- Wis. Stat. § 43.24(2)(h) Professional consultant services to participating public libraries.

Identify consultants, specific service areas, and related activities. If the consultant is employed by a member library, indicate the library and the consultant's title:

Director Bradley Shipps provides consulting in administration and finance, planning and evaluation, and legal issues. Shipps also administers the new director mentor program.

Library Services Manager Evan Bend provides consulting in web site development, electronic resources, and oversees the Youth Services Liaison and the Inclusive Services Liaison.

OWLSnet Manager Amanda Lee and Circulation Specialist Molly Komp provide consulting in automation, technical services, staff training, and collection development.

Network Manager Dave Bacon and Technology Coordinator Julie Leopold provide consulting in technology services and computer selection and use.

Graphic Arts & Communications Specialist Chad Glamann provides consulting in marketing, PR, and advocacy as well as graphic design services.

Catalog Librarian John Wisneski provides consulting in cataloging best practices.

ASSURANCES (cont'd)

All members of the OWLS professional team are involved in new director orientation.

Upon request, the OWLS professional team will visit member libraries and provide consulting reports in the areas of general library organization or workflow analysis.

In 2019 and 2020, OWLS provided financial and staff support for the Waupaca Area Public Library and the Clintonville Public Library to participate in the WiLS Strategic Planning Cohort.

Indicate new or priority activities relating to this requirement for the plan year (if no change from current year, indicate *None*):

None

Inclusive Services

- Wis. Stat. § 43.24(2)(k) Promotion and facilitation of library service to users with special needs.

The Division interprets services to users with special needs as inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community, including services to individuals or groups for whom using the public library is difficult, limited, or minimized.

Indicate new or priority activities relating to this requirement for the plan year:

OWLS contracts with the Muehl Public Library in Seymour to have Director Elizabeth Timmins serve as the Inclusive Service Liaison to OWLS member libraries. Elizabeth attends statewide inclusive services meetings on behalf of OWLS, shares best practices for inclusive services at directors meetings, and recommends materials for purchase by OWLS.

Other Service Programs

Wis. Stat. § 43.24(2)(f) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library system board after consultation with participating public libraries.

List each "other" service program individually with ongoing activities and new or priority activities for the plan year under each program. For instance, if the system provides a bookmobile service program, list ongoing activities and new or priority activities for the bookmobile program. (Do not lump miscellaneous activities under a single "other" program.)

Library Services to Youth

- OWLS will provide an email discussion list specifically for youth librarians to share information.
- OWLS will facilitate the interaction of youth librarians at 3-5 brown bag lunch meetings per year.
- OWLS will provide supplementary materials in support of summer library programs, including purchasing a limited amount of the Collaborative SLP materials from Upstart.
- OWLS will continue to offer grants for summer library program performers or other special summer library program activities.
- OWLS will continue to contract with a member library for a librarian to serve as the system's Youth Services Liaison.

Public Information and Promotion

- OWLS will continue to provide design and printing services for member libraries and system programs, including bookmarks, resource lists, brochures, signs, forms, logo design, and buttons. Member libraries will continue to receive these services for a nominal cost.
- OWLS will seek to ensure that all member libraries, especially those with new directors, are aware of the full range of services available to them.
- OWLS will provide materials to OWLSnet member libraries to promote the use of InfoSoup.

Literacy Support

- OWLS will continue to support the work of Fox Valley Literacy providing grants, printing, delivery of materials to tutors in other communities, and use of mailing facilities and services.
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ASSURANCES (cont'd)

Administration

- The system will not expend more than 20 percent of state aid received in the plan year for administration.
 - The system will submit the 2020 system audit to the Division no later than September 30, 2021.
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Budget

- The system completed and included the budget by service program category and fund source for the plan year (see guidelines).
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COLLABORATIVE ACTIVITIES

Summary of Activities *Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2021 resource library contract.*


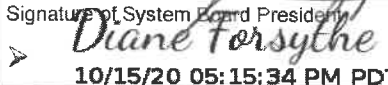
There are several activities that OWLS shares with other entities. The primary service is OWLSnet which is shared with the libraries of OWLS and those in NFLS (excluding Brown County). OWLS also cooperates with other library systems in providing CE opportunities. OWLS provides financial support (as well as in-kind services) to the Fox Valley Literacy Council. OWLS also participates in Recollection Wisconsin.

Cost Benefit For each activity above, list the activity name and estimated cost benefit realized.


Activity	Amount
1. OWLSnet automation partnership	\$100,000
2. NEWI CE Agreement	\$45,000
3. WPLC	\$50,000
4. Fox Valley Literacy	\$4,500
5. Recollection Wisconsin	\$3,000
6.	
7.	
8.	
9.	
10.	
Cost Benefit Total	\$202,500

CERTIFICATION

WE, THE UNDERSIGNED, CERTIFY that to the best of our knowledge, the information provided in this document and any attachments is true and correct, and that the system will be in full compliance with all applicable provisions of Chapter 43 of the Wisconsin Statutes for the year **2021**.

Name of System Director Bradley Shipps	Signature of System Director 	Date Signed Mo./Day/Yr. 10/15/2020
Name of System Board President Diane Forsythe	Signature of System Board President  10/15/20 05:15:34 PM PDT	Date Signed Mo./Day/Yr. 2020-10-15

**FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved <i>See Comments.</i> <input type="checkbox"/> Not Approved <i>See Comments.</i>	DLT Assistant Superintendent Signature 	Date Signed Mo./Day/Yr. 10/26/2020
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Comments

PUBLIC LIBRARY SYSTEM 2021 ANNUAL PROGRAM BUDGET					
Program	2021 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
Technology, Reference, and Interlibrary Loan*					
1. OWLSnet	\$148,401	\$0	\$0	\$777,288	
2. OWLS	\$119,542	\$0	\$0	\$5,000	
3. WISELearn	\$0	\$0	\$90,945	\$0	
4.					
5. Electronic Resources	\$18,646	\$0	\$0	\$122,673	
Program Total	\$286,589	\$0	\$90,945	\$904,961	\$1,282,495
Continuing Education and Consulting Service*					
1. CE & Consulting	\$26,872	\$0	\$0	\$0	
2.					
Program Total	\$26,872	\$0	\$0	\$0	\$26,872
Delivery Services	\$96,710	\$0	\$0	\$38,152	\$134,862
Inclusive Services	\$12,171	\$0	\$0	\$0	\$12,171
Library Collection Development	\$0	\$0	\$0	\$0	\$0
Direct Payment to Members for Nonresident Access	\$0	\$0	\$0	\$2,954,034	\$2,954,034
Direct Nonresident Access Payments Across System Borders	\$8,000	\$0	\$0	\$406,273	\$414,273
Youth Services	\$45,873	\$0	\$0	\$0	\$45,873
Public Information	\$53,360	\$0	\$0	\$1,000	\$54,360
Administration	\$106,405	\$9,000	\$0	\$500	\$115,905
Subtotal	\$322,519	\$9,000	\$0	\$3,399,959	\$3,731,478
Other System Programs					
1. Capital Expenditures	\$12,000	\$0	\$0	\$0	\$12,000
2.					\$0
Program Total	\$12,000	\$0	\$0	\$0	\$12,000
Grand Totals	\$647,980	\$9,000	\$90,945	\$4,304,920	\$5,052,845

*These programs may be divided into subprograms at the discretion of the system. If choosing not to use subprograms, enter amounts on line 1. Line 5 is reserved for the amounts budgeted for electronic resources (see program budget guidelines).

eSign Id: 63477799	Reference Id: System Plan	From: BRADLEY SHIPPS	Status: Signed
Documents Type: CUSTOM REQUEST	Loan Id: Custom_Request	Documents: 1	Signatures: Y

List of Signers

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
DIANE FORSYTHE dforsythe@bricktonmortgage.com		10/15/20 03:59:05 PM	10/15/20 05:14:02 PM	10/15/20 05:14:11 PM	10/15/20 05:14:31 PM	10/15/20 05:15:34 PM

Audit Log

Date/Time	Person	IP Address	Action
10/15/20 03:59:05 PM	SYSTEM USER	65.25.221.18	eSign event created
10/15/20 04:04:33 PM	DIANE FORSYTHE	65.25.221.18	Invitation sent to dforsythe@bricktonmortgage.com
10/15/20 05:14:02 PM	DIANE FORSYTHE	98.212.129.239	eSign event started
10/15/20 05:14:11 PM	DIANE FORSYTHE	98.212.129.239	Consented to DocMagic eSign
10/15/20 05:14:30 PM	DIANE FORSYTHE	98.212.129.239	Approved electronic representation of signature - "Diane Forsythe"
10/15/20 05:14:31 PM	DIANE FORSYTHE	98.212.129.239	Disclosure version 1 prepared on October 15, 2020, 3:59 pm PDT displayed
10/15/20 05:15:34 PM	DIANE FORSYTHE	98.212.129.239	eSign event signing complete
10/15/20 05:15:34 PM	DIANE FORSYTHE	98.212.129.239	f2446 2021 signed by Diane Forsythe
10/15/20 05:15:35 PM	SYSTEM USER	98.212.129.239	eSign event completed
10/15/20 05:15:36 PM	SYSTEM USER	98.212.129.239	eSign Documents delivered

List of Documents

Document Name	Page(s)	Mark(s)	Signer(s)
F2446 2021	9	2	2