



Required by Wis. Stat. §§ 43.17(5) and 43.24(3)

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## GENERAL INFORMATION

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Library System

Lakeshores Library System

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Describe significant needs, opportunities, and challenges that influenced the development of this and other system plans.

Needs that influenced development of this plan:

- 1.) Flexibility. Lakeshores Library System (LLS) anticipates continued fluidity with regard to the needs of our member libraries, county library planning activities, a potential merger of the Arrowhead and Lakeshores library systems, and the ongoing effects of the COVID pandemic in 2022.
- 2.) Budget Pressure on Member Libraries. Libraries are under constant budget pressure, and the system budget for 2022 includes a number of funding choices designed to create offsets for the members.
- 3.) Member Library Feedback. Member libraries provided feedback to the system through a system services survey in early 2020.
- 4.) Increase in State Aid. After a period of ten years largely characterised by flat funding levels, regional library systems will see an increase in state aid. This plan, with particular respect to the budget, includes a number of choices designed to prioritize the use of additional state aid funding in a manner that introduces new services, creates budget offsets for member libraries, and creates opportunities for the system to modify its staffing profile.
- 5.) Attrition. LLS is facing two potential retirements over the next few years, is engaged in laying the budgetary groundwork for necessary transitions, and actively considering how to modify the system's staff profile in a way that better addresses the evolving needs of member libraries.

Opportunities that influenced development of this plan:

- 1.) Exploration of a merger with Arrowhead Library System (ALS). ALS and LLS have complementary staff profiles and similar member library culture. The two systems have also developed progressively-intertwined services through various contracts, joint grant projects, and through the SHARE Consortium. A merger of the two systems could benefit member libraries through greater economies of scale, a broader palette of services driven by more specialist staff, and less administrative overhead.
- 2.) Increased Availability of Federal Grant Funding. There will be greater opportunities to fund regional initiatives - and to provide administrative/logistical support for member library-specific projects - through the LSTA program. The American Recovery Plan Act (ARPA) will provide an infusion of additional funding opportunities through 2022, so grant planning and logistics will be a significant short-term priority over the coming year.

Challenges that influenced development of this plan:

- 1.) COVID Pandemic. Health concerns related to COVID have altered how member libraries serve their communities, how the system functions, and how all stakeholders communicate. An ongoing challenge will be to continue to find ways to adapt to a shifting environment.
  - 2.) Uncertainty Regarding the Future of the System. Should ALS and LLS merge, there is an opportunity for a great deal of (positive) disruption to historical constructs to take place. If ALS and LLS do not merge, LLS will nonetheless need to undergo a strategic planning process that may also be disruptive to many elements of the system (again, in a positive way). Each scenario presents challenges related to planning, communication, and organizational change.
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**GENERAL INFORMATION (cont'd.)**


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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:**

The draft plan was written to reflect feedback from the member libraries expressed during meetings of the Librarian Advisory Committee (LAC), via surveys, and individual correspondence over the previous year. The draft plan was also shared concurrently with representatives of the Librarian Advisory Committee and System Board for comment in advance of the September 21st, 2021 meeting of the System Board.

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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:**

The system considers the director of each member library as the appointed representative to the Librarian Advisory Committee. Representatives may delegate a proxy representative from the library staff according to precedent. A representative from the Librarian Advisory Committee is welcome to attend System Board meetings. Alternatively, the System Board member liaison to the committee acts as a communication link between the two bodies.

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**ASSURANCES**


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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 **2022**. 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:**

All compliance documents related to this plan are located at the following URL:  
<https://drive.google.com/drive/folders/1C0Snb2UjIkaPDyXCXW1Ik2YR8-KCfMT0>

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**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:**

All compliance documents related to this plan are located at the following URL:  
<https://drive.google.com/drive/folders/1C0Snb2UjIkaPDyXCXW1Ik2YR8-KCfMT0>

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**ASSURANCES (cont'd)**


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**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:**

## Reference Referral:

- Reference referrals are relayed within and outside of the system largely via email.
- The system contract with a resource library (Racine Public Library) provides a framework for rare situations when another member library must refer a patron question to specialist reference staff elsewhere.

## Interlibrary Loan Requests:

- Maintains the SHARE ILS, which fully automates the interlibrary loan process between all of the public libraries in Kenosha, Racine, Rock and Walworth counties.
- Maintains links to the WISCAT platform in the SHARE catalog so that patrons may directly initiate mediated interlibrary loan requests for materials that are only available outside of the 4 county SHARE service area.
- LLS currently maintains one Interlibrary Loan Specialist position responsible for operating a system clearinghouse for interlibrary loan requests originating from outside the system.
- Maintains source of consulting for member libraries regarding ILL issues and resource-sharing best practices.
- Advocates for the use of the Wisconsin Interlibrary Loan Guidelines by member libraries.

## Technology:

- Operates a technology help desk service covering all technology and ILS-related issues (including a 24/7 critical support hotline).
- Administers a converged wide-area-network which supports the member libraries of the Arrowhead, Lakeshores, Southwest Wisconsin, and partially Kenosha County Library Systems.
- Maintains and administers all hardware necessary to support the activities of the system, as well as contract services to other system partners (head-end routers, switches, network firewall, storage server w/ nightly full backups, web server, ILS servers w/ numerous application-specific servlets), deep freeze application servers.
- Primary point of contact with WISCNET for all troubleshooting issues affecting the wide area network covering ALS, LLS, KCLS, and SWLS.
- Primary point of contact for 3rd party vendor products that are integrated with the ILS on a SHARE-wide basis, or by individual member libraries.
- Manages annual large-scale procurements of library PC's and peripheral equipment.
- Coordinates the roll-out and vendor relations of RFID tagging and self-checks for SHARE member libraries.
- Delivers group-level training for library staff regarding operation of the ILS staff client.
- Manages local library IT operations (including local area networks, library PC management, library printing solutions, and coordinates with 3rd party technicians and municipal technology teams).
- Assists member libraries in planning for local technology decisions through budgeting recommendations, reviewing quotes for products, and researching products.
- Provides administrative support for technology programs and initiatives, including purchasing, invoicing, budgeting, and fiscal agency for cooperatively-purchased products and services.
- Operates a SHARE-wide library fine billing reconciliation program, which eliminates the need for libraries to bill each other for fines & fees paid at other libraries for their materials.
- Creates custom reports, scripts, and software applications in response to individual library or group needs.

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

- Due to vast improvements in automation of interlibrary loan workflows, the system may seek to make some changes to its staffing profile in 2022.
  - Negotiating and procuring a new mobile-app for the SHARE consortium in 2022.
  - No new or priority activities for 2022 are currently planned. However, there may be some new activities related to any 2022 LSTA or ARPA grant projects approved by the Division for funding. Should such happen, these activities will become a high priority due to the time constraints imposed by the grant timelines.
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**ASSURANCES (cont'd)**


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**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 professional learning opportunities.

**List ongoing activities related to this requirement.**

- The system provides annual budget funding for continuing education activities.
- The system participates in the SEWI continuing education cooperative, which plans, funds, and delivers in-person and virtual CE events over the course of each year. This is an ongoing collaborative venture between a number of regional systems in the Southeastern portion of Wisconsin.
- The system plans and offers additional continuing education opportunities, either on our own or in partnership with member libraries or other individual systems.
- The system shares externally curated lists of continuing education opportunities elsewhere in Wisconsin or nationally with member libraries via email.

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

- The system will seek opportunities to offer additional CE events to its member libraries beyond those offered through SEWI.

**Identify the names and email addresses of professional learning staff employed by the system for professional learning services:**

Steve Ohs (sohs@lakeshores.lib.wi.us) handles CE validation of member library directors and representing LLS for SEWI-related planning.

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

- The Bridges Library System serves as coordinator for SEWI. SEWI participants do not sign formal agreements, but do elect to participate annually, and participate in developing the annual budget for the program.

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**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.**

- The system appropriates annual funding for physical delivery of materials.
- A local company (Excell Express) provides physical delivery of library materials between member libraries five days per week (M-F).
- LLS also contracts with the South Central Library System for access to its statewide delivery network.
- ALS and LLS share the funding of a delivery link between the LLS sorting hub at the Racine Public Library and the ALS sorting hub in Milton.
- Electronic communication between and among the system and member libraries is facilitated via organizational gsuite accounts, which are managed by the system.
- The system surveys, monitors, and evaluates delivery volume in an ongoing fashion.

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

ALS, Kenosha County Library System (KCLS) and LLS are participating in a DPI-mediated project to create greater efficiencies in statewide delivery via the principles of the Public Library Redesign Project (PLSR). This is an ongoing effort that will, it is hoped, result in some regional consolidation of the various delivery routes and contracts that serve the Southeastern region of Wisconsin.

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**ASSURANCES (cont'd)**

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**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:**

All compliance documents related to this plan are located at the following URL:

<https://drive.google.com/drive/folders/1C0Snb2UjIkaPDyXCXW1Ik2YR8-KCfMT0>

**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:**

LLS maintains five intersystem agreements and a resource library contract at the following URL:

<https://drive.google.com/drive/folders/1C0Snb2UjIkaPDyXCXW1Ik2YR8-KCfMT0>

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**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:**

All compliance documents related to this plan are located at the following URL:

<https://drive.google.com/drive/folders/1C0Snb2UjIkaPDyXCXW1Ik2YR8-KCfMT0>

**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:**

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**ASSURANCES (cont'd)**


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**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, 2022, 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:

All compliance documents related to this plan are located at the following URL:  
<https://drive.google.com/drive/folders/1C0Snb2UjIkaPDyXCXW1lk2YR8-KCfMT0>

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:

There are no new activities related to this requirement currently planned for 2022.

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**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:

The system does not currently employ any dedicated consultants. Rather, system staff address the various portfolios of consulting topics in parallel with their respective specialties/position descriptions.

- Administrator (Steve Ohs - sohs@lakeshores.lib.wi.us) | Library administration, space and building concerns, general planning, personnel issues, library law, county reimbursement, county procedures, county library planning, library board issues and planning, municipal relations.
  - Office Manager (Janice Martin - jmars@lakeshores.lib.wi.us) | Financial management, accounting, library fine/bill reconciliation, budgets, WRS and benefit issues, administrative practices.
  - IT Manager (Jim Novy - jnovy@lakeshores.lib.wi.us) | IT planning, IT budgeting, ILS tuning & policy work, library work flows, library websites, data analysis practices, network security, patron data privacy issues, records requests from law enforcement, municipal technology coordination, Federal erate applications and planning, LSTA CIPA compliance.
  - System Services Technologist (David Dowling - ddowling@lakeshores.lib.wi.us) | ILS tuning & policy work, library staff ILS training & questions, custom reports and scripting, digital archiving, general IT questions.
  - Interlibrary Loan Specialist (Vicki Keith - vkeith@lakeshores.lib.wi.us) | Interlibrary loan best practices, WISCAT use and best practices, lost-item tracking and reconciliation, general resource-sharing questions, staff best practices for local management of interlibrary loan work flows.
  - Local Library IT Technician (Brad Hudson - bhudson@lakeshores.lib.wi.us) | Help desk questions, general questions related to library PC's and network connectivity.
  - Contract Children's & YA Services Position (Jennifer Puccini - jpuccini@lakeshores.lib.wi.us) | Storywagon program planning and coordination, general childrens and young adult services questions.
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**ASSURANCES (cont'd)**


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For other consulting topics, LLS staff serve as an intermediary, using our connections to find qualified resources or staff who can address the request.

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

There are not any specific new activities planned. However, the overall model of how the system provides access to consulting services may undergo significant changes in the coming years, either as part of standing-up a newly merged system, or if the overall service priorities of LLS change after strategic planning (if the systems do not merge).

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**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:**

- As a component of its annual budgeting process, the system is establishing funding for memory kits. Memory kits are designed, in particular for library users with Alzheimer's Disease, dementia, or other memory-care needs.
- The system intends to take a more active approach to promoting and supporting the use of the Inclusive Services Assessment and Guide.
- The system was requested to suspend delivery service to the inmates of the Racine Correctional Institution during 2021 as a result of the COVID pandemic. It is anticipated this service shall resume during the 2022 calendar year.

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**Other Service Programs**

Wis. Stat. § 43.24(2)(i) 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.)**

- The system maintains an "equipment co-op" consisting of items that may be borrowed by any member library. Items include projectors, robotics kits, document scanners, VHS to DVD converters, collection inventory equipment, RFID conversion carts, 3D printers, music creation kits, and gaming platforms.
- The system operates separate cooperative purchasing programs for member libraries of LLS and the SHARE consortium. LLS's activities with regard to cooperative purchasing include product recommendations, vendor research, managing vendor presentations at meetings, negotiating group pricing, preparing budget documents for the respective decision-making bodies, relaying troubleshooting requests and securing/reporting usage statistics.
- The system manages the process of annual report pre-fill for the member libraries of ALS, LLS, and KCLS.

New or Priority Activities for 2022:

- The system would like to incorporate some key budget-related data into the annual report pre-fill dataset in 2022. These data will hopefully include county appropriations and co-op funding amounts for electronic resources procured through the system.

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**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 2021 system audit to the Division no later than September 30, 2022.

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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 2022 resource library contract.*

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

Activity	Amount
1. Wisconsin Public Library Consortium Collection (State OverDrive Collection)	\$1,682,704
2. SEWI Continuing Education Partnership	\$12,000
3. Wisconsin Trustee Training Week	\$1,200
4. Wild Wisconsin Winter Web Conference	\$3,500
5.	
6.	
7.	
8.	
9.	
10.	
<b>Cost Benefit Total</b>	<b>\$1,699,404</b>

**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 **2022**.

Name of System Director <i>Stephen Ows</i>	Signature of System Director ➤ <i>Stephen Ows</i>	Date Signed Mo./Day/Yr. <i>9/21/2021</i>
Name of System Board President <i>Laurie Kant-Hull</i>	Signature of System Board President ➤ <i>Laurie Kant-Hull</i>	Date Signed Mo./Day/Yr. <i>9/21/2021</i>

**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 ➤ <i>Jessamichaelsonschmidt</i>	Date Signed Mo./Day/Yr. 11/12/2021
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Comments



**PUBLIC LIBRARY SYSTEM 2022  
ANNUAL PROGRAM BUDGET**

<b>Program</b>	<b>2022 Public Library System Aid</b>	<b>System Aid Carryover and Interest Earned</b>	<b>Other State and Federal Library Program Funds</b>	<b>All Other Income</b>	<b>Total</b>
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**Technology, Reference, and Interlibrary Loan\***

1. Technology	\$85,973	\$0	\$55,000	\$106,898	
2. Reference	\$7,000	\$0	\$0	\$0	
3. Interlibrary Loan	\$88,135	\$0	\$0	\$0	
4. SHARE Consortium	\$232,074	\$0	\$0	\$202,803	
5. Electronic Resources	\$35,130	\$0	\$0	\$145,284	
<b>Program Total</b>	<b>\$448,312</b>	<b>\$0</b>	<b>\$55,000</b>	<b>\$454,985</b>	<b>\$958,297</b>

**Professional Learning and Consulting Service\***

1. Professional Learning	\$11,500	\$0	\$0	\$0	
2. Consulting	\$74,011	\$0	\$0	\$0	
<b>Program Total</b>	<b>\$85,511</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$85,511</b>

<b>Delivery Services</b>	\$124,613	\$0	\$0	\$16,700	\$141,313
<b>Inclusive Services</b>	\$3,000	\$0	\$0	\$0	\$3,000
<b>Library Collection Development</b>	\$525	\$0	\$0	\$3,500	\$4,025
<b>Direct Payment to Members for Nonresident Access</b>	\$0	\$0	\$0	\$4,321,660	\$4,321,660
<b>Direct Nonresident Access Payments Across System Borders</b>	\$0	\$0	\$0	\$626,105	\$626,105
<b>Youth Services</b>	\$28,000	\$0	\$0	\$0	\$28,000
<b>Public Information</b>	\$8,026	\$0	\$0	\$20,000	\$28,026
<b>Administration</b>	\$139,137	\$0	\$0	\$0	\$139,137
<b>Subtotal</b>	<b>\$303,301</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,987,965</b>	<b>\$5,291,266</b>

**Other System Programs**

1. SHARE Reserve	\$0	\$0	\$0	\$32,600	\$32,600
2. LLS Reserve Recovery	\$0	\$1,500	\$0	\$27,226	\$28,726
<b>Program Total</b>	<b>\$0</b>	<b>\$1,500</b>	<b>\$0</b>	<b>\$59,826</b>	<b>\$61,326</b>
<b>Grand Totals</b>	<b>\$837,124</b>	<b>\$1,500</b>	<b>\$55,000</b>	<b>\$5,502,776</b>	<b>\$6,396,400</b>

\*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).