



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

GENERAL INFORMATION

Library System

Southwest Wisconsin Library System

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

A major challenge SWLS faces as it plans for 2024 and beyond is maintaining and developing system services desired by member libraries while working within a meager budget, and that in the face of growing member library needs and increasing costs of materials, services, and personnel.

The turnover of library directors in the region continues to affect SWLS service offerings, though the rate of this turnover slowed in 2023. Many library directors in the region are still new to the profession and require professional development support in many areas, from library operations to administration to collection management. Many directors at our small libraries have part-time schedules and little availability for trainings, meetings, or collaborative projects that could help broaden and deepen their experiences and knowledge of the field. This all adds to the system's need to be the organization that reaches out more, which is an appropriate role for the system but involves time and effort, and incurs costs.

The system continues to seek to foster expansion of library offerings in cooperation with member libraries to bring library service to underserved areas within the system boundaries.

SWLS looks forward to the unfolding of the new state Library Services and Technology Act (LSTA) five-year plan 2023-2027, expecting it to advance some of the viable projects of the Public Library System Redesign process and its recommendations, as well as other activities in the spirit of that endeavor. Encouraging and institutionalizing collaborations and shared projects among interested systems and libraries will improve services to libraries as well as result in some useful efficiencies at the system level. Systemically underfunded public library systems are at times less able to pursue these interests, so grant aid that helps overcome hurdles and assists in activating the possibility of participation is appreciated. The Wisconsin Public Library Consortium may further develop into an avenue for facilitating large-scale collaborations of varying types.

Even with the hope that some of the significant shared revenue increases that municipalities are to receive from the state might allow some growth of local library budgets for 2024, the services public libraries need from Wisconsin library systems are not decreasing, nor are their costs. Retaining qualified system personnel who can provide system services at high levels requires appropriate salaries and benefits. SWLS will continue to need to collaborate and to engage external consultants for professional coverage of areas such as youth services, technology support, and certain professional learning activities. SWLS is open to working with other systems or libraries on shared positions that could perhaps be made attractive with shared support, as long as member libraries see benefits from the work.

SWLS is grateful for the increase in state aid for 2024 and 2025. The aid increase has helped the system remunerate staff and shore up funding for activities that had been significantly supplemented with grant money in recent years. The 2024 SWLS budget relies on no grant money to fund core operations -- revenues from state aid, member library fees, and contracted services form the core of the 2024 operations budget.

Despite the helpful state aid adjustment, SWLS remains in need of significantly increased funding to serve its public library members and interact as a peer with other library systems of the state. SWLS has almost no ability to contribute its own funding to statewide collaborative projects or to sustain participation in them over time. It increasingly relies on carryover funds for balancing budgets, which cannot go on forever. Supplementing costs of services for member libraries is an increasing challenge. Improved equity related to library system funding continues to be needed for the longer term. Systemic underfunding of certain geographies puts burdens on the libraries of those regions and their patrons and communities, solely because they are located within a certain library system boundary.

GENERAL INFORMATION (cont'd.)

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:

Contents of the 2024 system plan document reflect needs and desires of member libraries expressed at Net Southwest, SWLS Public Library Advisory Committee (PLAC), and other committee meetings and during library consultations with system staff during 2023. Also, a large amount of member library input was received via in-person retreats and surveying related to creation of a 2024-2026 strategic plan for the system. Input was encouraged from member libraries at the August 2023 PLAC meeting ahead of the plan's finalization and its approval by the SWLS Board of Trustees at the September 2023 board meeting.

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:

A Public Library Advisory Committee (PLAC) that includes representatives of all system members meets six times per year in part to discuss its own topics and in part to advise and communicate with system staff and the Board of Trustees. Meetings are posted in accordance with open meetings guidelines from the Wisconsin Dept. of Justice. The group's most recent meeting minutes are shared with the SWLS Board of Trustees, and approved minutes are also shared with the Division for Libraries and Technology. Additionally, a member of the SWLS Board of Trustees is designated to attend the PLAC meetings, and PLAC selects a library representative to serve as a liaison to the SWLS Board of Trustees meetings.

The system also provides support for meetings of the members' regional shared integrated library system (ILS) consortium, Net Southwest. This group includes all 28 member public libraries in the SWLS region. The Net Southwest Directors Council meets in the same fashion as the PLAC group and meetings, postings, and communications are handled in the same manner.

Additional committees advise the system and member libraries in more specific topic areas:

The Best Practices Committee advises participants in the shared ILS consortium on topics associated with the ILS and related service operations; the committee meets as needed; members are library directors or staff who volunteer; the committee reports to the Net Southwest and PLAC groups.

The Technology Committee advises on topics related to system technology services, library technology best practices, and explores new technologies; the group meets bi-monthly; members are library directors and staff who volunteer; the committee reports to the Net Southwest and PLAC groups.

The Cataloging Advisory Group addresses topics related to the cataloging of materials and contents of records in the shared online catalog. The group meets on an as-needed basis, at least twice a year. Members include a representative of the SWLS cataloging staff and interested staff from SWLS libraries. The committee reports to the Net Southwest and PLAC groups.

Further, member counties have library committees that prepare the county library plans and in some cases are standing committees that meet annually, quarterly or otherwise regularly to discuss and plan improvements to library service within their counties. The system seeks to attend and participate in county library committee meetings to support library services to county residents, facilitate communication to and from the committees, and assist with creation and updating of county library plans.

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 **2024**. 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:

1. Continue to manage and support a shared integrated library system (ILS) and resource sharing among member libraries of SWLS.
2. Continue to use WISCAT for interlibrary loan and provide an ILL clearinghouse; Net Southwest member libraries use the Circ Interlibrary Loan (C-ILL) module of the shared Verso ILS to interface with the WISCAT database.
3. Continue to provide bibliographic records and cataloging of materials for member libraries.
4. Provide funding through the Intra-System Resource Library Agreement with Platteville Public Library for additional copies of bestselling and/or popular titles to facilitate resource sharing.
5. Provide deployment and tech support for member library computers, laptops, wifi, and networks via collaborative technology support agreement with Prairie Lakes Library System.
6. Assist member libraries with access to group technology equipment purchases.
7. Provide access to digital materials through WPLC collaboration.
8. Continue to fund online resources for member library patron use to foster lifelong learning and workforce development.
9. Maintain a laptop lab available for lending to libraries.
10. Help support self-checkout machines in place at 14 SWLS library locations.
11. Monitor activity related to online library card registration tool that works in conjunction with the shared ILS for all SWLS libraries.
13. Continue to evaluate system-owned equipment and kits that libraries may borrow.

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

1. In 2024, begin investigations of projects related to items in the new 2024-2026 strategic plan.
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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.

1. Provide or partner for at least eight system-sponsored workshops for member library directors, staff, and trustees.
2. Provide or sponsor at least 10 hours of technology-related training.
3. Maintain an online calendar of continuing education opportunities.
4. Maintain a laptop lab and presentation package available to member libraries for use in technology training and presentations.
5. Assist member libraries with the library director certification and re-certification process.
6. Co-sponsor at least two webinars with other library systems.
7. Per the system's Technology and Resource Sharing Plan, system professional staff will participate in technology-related professional learning and training each year.
8. Continue to develop web-based, system-specific video tutorials related to ILS usage, best practices, and other topics.
9. Provide OverDrive/Libby support and information for member libraries.
10. Connect libraries with resources related to facilities and space planning.

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

1. Support member libraries' staff professional learning efforts through LSTA grants.

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

SWLS Outreach and Continuing Education Consultant Shauna Koszegi, skoszegi@swls.org;
 Youth Services Consultant (via contract) Carrie Portz, carrieporz@gmail.com;
 SWLS System Director David Kranz, dkranz@swls.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:

SWLS members participate in webinar and workshop offerings that are supported by all of the library systems of the state, including the Wild Winter Web Conference organized by the Wisconsin Valley Library Service (WVLS), Trustee Training Week organized by the South Central Library System (SCLS), and Tech Days organized by system continuing education coordinators from around the state collaboratively.

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.

1. Coordinate internet access for member libraries with BadgerNet/TEACH datalines working with our technology support partners.
 2. Maintain a wide area network for members of NetSouthwest with BadgerNet/TEACH service; include those without BadgerNet/TEACH service via VPN as network security allows.
 3. Make available to all SWLS member libraries and branches 3-day-per-week delivery.
 4. Provide 1-day-per-week delivery during the academic year to the 31 public school districts of CESA 3 on a contractual basis, to facilitate resource sharing.
 5. Provide a pick-up/drop-off location for physical items in interlibrary loan en route to or from Southwest Wisconsin Technical College, to facilitate resource sharing.
 5. Contract with South Central Library System for statewide delivery service to SWLS.
 6. Perform regional portion of the statewide delivery network to serve UW-Platteville with 5-day-per-week delivery at its Platteville campus.
 6. Post SWLS Board of Trustees meeting agendas and approved minutes as well as agendas and approved minutes of committees of SWLS on the SWLS website.
 7. Continue to use Google Drive as a collaboration and communication tool between SWLS and member libraries.
 8. Continue fleet maintenance activities in support of consistent delivery service.
 9. Continue membership in WPLC and access to the OverDrive/Libby database.
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ASSURANCES (cont'd)

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

1. Update SWLS website and its content to make it more useful to member libraries and other users.
2. Provide more opportunities for member libraries to network, discuss important issues, and collaborate.

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:

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:

ASSURANCES (cont'd)

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, 202~~3~~⁴, 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:

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:

1. Carrie Portz will serve as a part-time Youth Services Consultant and work with member library youth and teen services staff in providing expertise in the areas of youth services planning and program implementation and evaluation.
2. Shauna Koszegi, SWLS Outreach and CE Consultant, consults on library director certification, continuing education, CE validation, CE-related grant activities, inclusive services, communication, marketing, grant writing, and outreach.
3. Jennifer Bernetzke, SWLS ILS Coordinator and ILL Consultant, consults on topics including ILS support and training, cataloging, collection development, ILL and WISCAT, administration, and annual reports.
4. Rosa Moore, SWLS Cataloger I, consults on topics including specialized materials cataloging, standards for cataloging, ILS support, and ILL and WISCAT support.
5. David Kranz, SWLS Director, consults on topics including library director certification, continuing education, administration, annual reports, system services, new library director orientation, trustee orientation and relationships, grants, and state reports.
6. Large-format printing and limited graphic design assistance is available to SWLS-member libraries from Schreiner Memorial Library, Lancaster.
7. Die-cut orders using the system's die-cut collection can be fulfilled by staff at the Brewer Public Library, Richland Center.

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

1. Survey member libraries about their desires for increased youth services consulting support, and what that desired increase really means.
2. Begin investigations and projects from the new 2024-2026 strategic plan.

ASSURANCES (cont'd)

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:

1. Continue to develop the rotating Spanish-language collections that were introduced in 2023.
 2. Encourage space and facilities evaluations which include considerations of inclusive services.
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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.)

1. Provide collection, interpretation, and presentation of data at the system level upon request.
 2. Provide access to tools that allow member libraries to collect, interpret, and present local data.
 3. Encourage and facilitate member library participation in awareness events such as WLA's Library Legislative Day.
 4. Communicate with the boards of the five counties that SWLS serves through SWLS Board of Trustee meeting minutes and county board meeting presentations.
 5. Develop processes to evaluate the online resources provided to member libraries for patron use.
 6. Communicate with area elected officials at the state and federal level about library activities in their district.
 7. Assist member libraries in building relationships with local, state, and federal elected officials.
 8. Administer a grant program for member libraries that makes available for library projects a portion of the Technology Reserve fund.
 9. Improve communication to libraries and their boards about the possibilities of county appointments to library boards.
 10. Improve libraries' awareness of and familiarity with the calculation performed annually to determine a municipality's eligibility to be exempted from the county library tax.
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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 202~~3~~ system audit to the Division no later than September 30, 202~~4~~.
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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 2024 resource library contract.*

1. Outsource Accounting to Winnefox Library System: they process checks & payroll, maintain fiscal records and assist with the audit.
2. Contract for Youth Services Consultant position: schedule YS workshops, represent SWLS at state meetings, provide consulting on YS issues/topics to member libraries.
3. Co-sponsor webinars and in-person workshops with other library systems: share the workload of producing these continuing education events and increase the opportunities for member libraries to participate and network.
4. Delivery and materials handling for CESA 3 school districts and Southwest Tech Library: provide delivery 1 day per week to CESA 3 school districts of school and library materials including regional and statewide interlibrary loan, and provide a pick-up/drop-off location for interlibrary loan materials en route to and from Southwest Tech Library, facilitating interlibrary loan between public libraries and schools, encouraging collaboration and resource sharing.
5. Contract with another library system for technology support.
6. WPLC Wisconsin Digital Library Collection: participation in the WPLC OverDrive/Libby collection buying pool provides SWLS-area patrons with access to a large collection of digital content that would not be available were SWLS or one of its members to do it alone.
7. Participate in grant-funded digitization kits and provide training for scanning of local history materials located in SWLS libraries that do not have the equipment or experience to independently pursue this activity.
8. Work with intra-system resource library Platteville Public Library for collection management of system rotating collections of audiobooks and large print materials.
9. Perform a regional portion of statewide delivery, working with SCLS, UW campus in the region, and other partners.

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

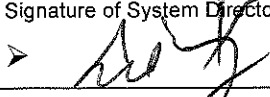
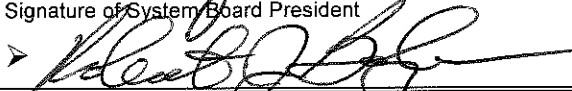
Activity	Amount
1. Outsource accounting	\$65,000
2. YS consultant contract	\$36,000
3. Co-sponsor webinars and workshops	\$6,300
4. Contract for delivery to public schools	\$12,340
5. Contract for technology support	\$450,000
6. WPLC Wisconsin Digital Library Collection	\$1,475,000
7. Digitization kits	\$2,000
8. Rotating collections agreements	\$8,000

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

Activity	Amount
9. Regional portion of statewide delivery	\$9,150
10.	
Cost Benefit Total	\$2,063,790

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 ~~2023~~ 2024.

Name of System Director David C. Kranz	Signature of System Director ➤ 	Date Signed Mo./Day/Yr. 9/20/2023
Name of System Board President Robert J. Boyle	Signature of System Board President ➤ 	Date Signed Mo./Day/Yr. 9/20/2023

**FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature ➤ Darrell L. Williams, Ph.D.	Date Signed Mo./Day/Yr. 11/20/23
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Comments

PUBLIC LIBRARY SYSTEM 2023*
ANNUAL PROGRAM BUDGET

Program	2023 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. Shared ILS and cataloging	\$62,414	\$1,653	\$0	\$172,761	
2. Reference and ILL	\$28,395	\$860	\$0	\$0	
3. Technology	\$51,594	\$6,599	\$0	\$25,498	
4.					
5. Electronic Resources	\$26,142	\$38,844	\$0	\$32,097	
Program Total	\$168,545	\$47,956	\$0	\$230,356	\$446,857
Continuing Education and Consulting Service*					
1. Continuing education	\$61,647	\$4,709	\$0	\$0	
2. Consulting	\$69,982	\$849	\$0	\$9,150	
Program Total	\$131,629	\$5,558	\$0	\$9,150	\$146,337
Delivery Services	\$121,431	\$831	\$0	\$12,340	\$134,602
Inclusive Services	\$11,807	\$561	\$0	\$0	\$12,368
Library Collection Development	\$5,683	\$4,148	\$0	\$7,625	\$17,456
Direct Payment to Members for Nonresident Access	\$0	\$0	\$0	\$0	\$0
Direct Nonresident Access Payments Across System Borders	\$0	\$0	\$0	\$0	\$0
Youth Services	\$15,932	\$4,190	\$0	\$2,000	\$22,122
Public Information	\$38,242	\$20,875	\$0	\$0	\$59,117
Administration	\$39,483	\$34,874	\$0	\$0	\$74,357
Subtotal	\$232,578	\$65,479	\$0	\$21,965	\$320,022
Other System Programs					
1. Designated funds				\$15,000	\$15,000
2. Vehicle purchase		\$50,000			\$50,000
Program Total	\$0	\$50,000	\$0	\$15,000	\$65,000
Grand Totals	\$532,752	\$168,993	\$0	\$276,471	\$978,216

*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).