



GENERAL INFORMATION

Library System

Southwest Wisconsin Library System

Describe demographic, economic, and other facts about your system that influenced the development of this and other system plans.

The Southwest Wisconsin Library system serves 28 public libraries in the following counties: Crawford, Grant, Iowa, Lafayette and Richland. These five counties represent an area that is approximately 3700 square miles with a population of 126, 778. This part of Wisconsin is rural with the largest municipality, Platteville, having a population of 11,224 (2015 estimate).

The SWLS service area lacks diversity with the population being 95% white. There has not been much change in diversity in this area. In 2010, the census showed the population as 96% white. By contrast, the State of Wisconsin is currently 81.9% "white alone" down from 83.3% in 2010. The population of SWLS is getting older. In 2010, 16.4% of the population was 65 years old and over. By 2015, the percentage of that age group has grown to 18.2%. This growth rate mirrors the increase in population 65 years old and over in the state. Many of the elderly in the area are aging in place.

Economically, the SWLS area remains behind the state average for median income in all counties except Iowa County. Agriculture, ag-related business and manufacturing continue to be the economic drivers of this area. Tourism also plays a role in the economy. The rolling hills, streams and the rivers (Mississippi and Wisconsin) make this area an outdoorsman's dream. Fishing, camping and hiking are popular tourist activities. The July 2016 unemployment rate shows all the counties at or below the State's unemployment rate with the exception of Crawford County's which is above. Even with low unemployment rates, approximately 13% of the population live in poverty.

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

There's no doubt that another year of flat funding has influenced the development of this, and other, system plans. In the past four years, SWLS has reduced staff, reorganized existing staff, outsourced some services and collaborated on others. 2017 will be no different.

Taking advantage of a staff retirement, SWLS will begin providing enhanced technology support for member libraries' local area networks. This will mark a vast improvement in the technology support services. In the past 5 years, SWLS has been able to provide only a minimal amount of technology support. Often, a member library would have to engage the services of an IT professional to solve an issue. This was quickly becoming cost prohibitive for the libraries. We anticipate that SWLS will be able to assist member libraries with all their technology needs involving hardware, software and internet access.

The staff retirement also allowed SWLS to address the issue of consulting for youth and young adult services. In the past, we've had part-time staff, contracted with a member library, and also contracted with another library system. None of those solutions quite worked out. In 2016, we contracted with a recently retired youth services librarian. The results have been amazing, and we are fortunate to be able to continue the contract in 2017.

Not all of the influences on this plan are related to budget. The rapidly changing nature of public library services is also an influence. In January of 2016, the member library directors met to discuss "Rising to the Challenge: Re-envisioning Public Libraries" otherwise referred to as the Aspen Report. As the libraries work to leverage their existing assets (People, Place & Platform) to address the Strategies for Success, SWLS will need to be flexible enough to provide the services and support needed. Re-evaluating system services, how we provide them, what skills are needed to provide them, etc., will become standard operating procedure rather than a once every three year process.

Finally, the Public Library System Redesign project is also influencing this plan. SWLS has representation on the Steering Committee and one of the workgroups. Through this project, we are learning more about how services are currently being provided by systems and how other states provide services at a regional level to public libraries. It has led to many great conversations at meetings which have resulted in some changes in service provision.

Describe the planning environment and process under which this and other system plans were developed. Include how member libraries are involved in plan development and review and whether your systems has a formally appointed advisory committee. (List additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the division.)

The Public Library Advisory Committee (PLAC), which is made up of the 28 directors of the member public libraries, meets six times per year and advises the SWLS staff and Board of Trustees on services and programs. One member of the PLAC is chosen to

GENERAL INFORMATION (cont'd.)

serve on the SWLS Board of Trustees in an advisory role as Member Library Liaison.

NetSouthwest is a consortium of SWLS and 27 member public libraries to operate a shared integrated library system. SWLS administers NetSouthwest and the directors of the participating libraries serve on the NetSouthwest Directors Council. The Directors Council meets six times per year to make recommendations on the priorities and funding for NetSouthwest.

The SWLS Technology Committee is made up of eight member library directors, two library technology staff and one SWLS staff members. This committee advises the PLAC on issues involving technology and meets six times per year.

Each SWLS county has a county library planning committee. The SWLS Director meets periodically with these committees to discuss countywide library issues.

SWLS Staff attend meeting, workshops and conferences sponsored by WLA, WAPL, and DLT to keep informed on current library issues. The staff also make regular visits to member libraries to learn more about their needs.

The above committees, the SWLS Board of Trustees, and staff have all been involved in the process of revising the SWLS Technology Plan and the SWLS Strategic Plan.

All committees, the SWLS Board of Trustess and staff were previously involved in the development of the following:

NetSouthwest Shared Integrated Library System Agreement

SWLS Technology Services Contract

Inter-system Resource Library Agreement with Madison Public Library and the Intra-System Resource Library Agreement with Platteville Public Library

Audio Book Circuit

LTE Rotating Collection

Agreement with CESA #3 for delivery services

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 2017. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

S.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

- (a) Written agreements that comply with s. 43.15(4)(c)4. with all member libraries.
- A copy of the agreement with a list of all members signing and the dates signed provided to the division by January 15.

Resource Library Agreement

- (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.
 - A signed copy of the resource library agreement will be provided to the division by January 15.
-

ASSURANCES (cont'd.)

Reference Referral, Interlibrary Loan, and Technology

- S.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 and resource sharing among the member libraries of SWLS
2. Continue to use WISCAT for interlibrary loan, Net Southwest member libraries use the Circ Interlibrary Loan module of VERSO 5 to interface with the WISCAT database.
3. Continue to provide cataloging of materials for Net Southwest member libraries
4. Provide funding through the Intra-System Resource Library Agreement with Platteville PL for additional copies of bestselling and/or popular titles to facilitate resource sharing.
5. Provide on-site and remote support for member library computers and local area networks
6. Assist member libraries with computer purchases
7. Provide technology competency guidelines for library directors and staff
8. Continue to provide the Pilot Projects in Technology grant program for member libraries
9. Support the CESA3 professional collection in the shared integrated library system as a way to facilitate borrowing between schools and public libraries.

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

1. Join the WRLS ECHO digitization project
 2. Provide access to digital magazines through WPLC collaboration
-

Inservice Training

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

List ongoing activities related to this requirement.

1. Provide ten system-sponsored workshops for member library directors, staff and trustees
2. Provide an additional 18 hours of technology-related training (12 hours of basic & 6 hours emerging)
2. Maintain an online calendar of continuing education opportunities
3. Provide a laptop lab and presentation package to member libraries for use in technology training
4. Subscribe to GoToMeeting/Webinar to facilitate online meetings and workshops
5. Assist member libraries with the library director certification and re-certification process
6. Co-sponsor at least two webinars with other library systems

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

1. Provide 6 hours of youth services training/workshops

List specific staff and resources dedicated to this requirement and/or contract arrangements with other libraries or systems.

Youth Services Consultant Contract with Marge Loch Wouters; Library and System Services Consultant, Peggy Freymiller; funds dedicated to paying for instructors and presenters of workshops; GoToMeeting/Webinar software.

	ASSURANCES (cont'd.)	
--	-----------------------------	--

Delivery and Communication

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

List ongoing activities related to this requirement.

1. Coordinate internet access for member libraries with BCN datalines through membership in WiscNet
2. Maintain a wide area network for members of Net Southwest with BCN datalines
3. Provide all SWLS member libraries and branches 3 day per week delivery
4. Provide 3 day per week delivery to the 33 school districts of CESA3 and SW Technical College on a contractual basis to facilitate resource sharing.
5. Contract with South Central Library System for statewide delivery service
6. Maintain internal communication strategy to ensure that member libraries are well-informed in a timely manner and to allow for the maximum amount of input on system services; use social media where and when it makes sense
7. Post SWLS Board of Trustees meeting agendas and minutes as well as agendas and minutes of committees of SWLS on the SWLS web page
8. Continue to use Google Drive as a collaboration and communication tool between SWLS and member libraries and among member libraries
9. Continue to use a cloud storage service to provide easy access to documents for member libraries not part of the SWLS WAN and for library directors and staff when not on the SWLS WAN.
10. Continue membership in WPLC and access to the OverDrive database.

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

1. Update the SWLS web page to make it more useful to member libraries as a repository of information
2. Provide more opportunities for member libraries to network, discuss important issues and collaborate.
3. Purchase van to replace the oldest of three delivery vans.

Service Agreements

- S.43.24(2)(g) Service agreements with all adjacent library systems
- A copy of the agreement with adjacent systems with a list of all systems signing the agreement will be provided to the division by January 15.

Other Types of Libraries

- S.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. A copy of the agreement with a list of all signing libraries will be provided to the division by January 15.
- Other types of libraries in the system area have had an opportunity to review and comment on the plan.

Library Technology and Resource Sharing Plan

- S.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.
- Member public libraries and other types of libraries in the system area have had an opportunity to review and comment on the plan.
- By January 1, 2017, the system's current plan for library technology and resource sharing or changes to the current plan will be submitted to the division.

	ASSURANCES (cont'd.)	
--	-----------------------------	--

Professional Consultation

- S. 43.24(2)(h) Professional consultant services to participating public libraries.

List ongoing activities related to this requirement.

1. Offer consulting to member library directors, staff and trustees on topics including, but not limited to: public library administration, adult and youth services, library automation, technical services, interlibrary loan, staff development, collection development, inclusive services, technology, state reports and other issues as needed
2. Provide information to local library trustees, municipal and county board meetings upon request
3. Provide orientations for new library directors, staff and trustees
4. Provide grant support services for member libraries, including identification of grant sources and grant-writing assistance
5. Oversee state compliance
6. Help member libraries develop effective instruction for the public
7. Assist member libraries with the process of filing annual reports
8. Provide on-site weeding assistance to member libraries upon request
9. Provide a professional reference collection

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

Indicate specific methods or means of communication with member libraries to fulfill this requirement.

We use email, telephone, workshops/webinars and in-person visits to fulfill this requirement.

Services to Users With Special Needs

- S.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.

List ongoing activities related to this requirement.

1. Continue to provide continuing education workshops that address providing inclusive library services
2. Pursue grant opportunities to assist member libraries in improving the inclusiveness of library services
3. Continue to provide access to library card application forms in large print and Spanish language

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

1. Begin to facilitate more discussions with and among member libraries about inclusive services

Other Service Programs

S.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 programs 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 Advancement and Awareness (Public Information)

1. Provide subscription to Library Aware to assist member libraries with marketing of library services
2. Work with member libraries on web site development, maintenance and evaluation
3. Provide member library directors, staff and trustees with information on pending legislation on the state and federal level that affects libraries
4. Provide collection, interpretation and presentation of data at the system levels upon request
5. Provide access to tools that allow member libraries to collect, interpret and present local data
6. Encourage and facilitate member library participation in awareness events such as WLA's Library Legislative Day
7. Communicate with the boards of the 5 counties that SWLS serves through biannual print newsletters, SWLS board of trustee

ASSURANCES (cont'd.)

meeting minutes and county board meeting presentations

8. Continue to market SWLS-provided databases
9. Communicate with area elected officials at the state and federal about library activities in their district
10. Assist member libraries in building relationships with local, state and federal elected officials

Youth Services

1. Contract with a member library, library system or individual to provide youth service consultant services to member public libraries
2. Provide continuing education opportunities relating to youth and young adults, including a workshop devoted to the Summer Library Program theme
3. Support early literacy initiatives and services

Administration

- The system will not expend more than 20 percent of the state aid projected to be received in the plan year for administration.
- The 2016 system audit will be submitted to the division no later than September 30, 2017.

Budget

- A copy of your public library system budget by service program category and fund source for the plan year (see attached guidelines) is attached.

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 2017 resource library contract.*

1. Outsourcing Accounting to Winnefox Library System: they process checks & payroll, maintain fiscal records and assist with the audit.
2. Contract out 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 & in-person workshops with other library systems: other system staff scheduled speakers, handled registratio and other logistics and monitored webinars
4. Delivery for CESA3 School Districts: provide delivery 3 days per week to CESA school districts, facilitating interlibrary loan between publiclibraries and schools, encouraging collaboration.
5. WPLC OverDrive Collection: participation in the WPLC OverDrive 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.

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

Activity	Amount
1. Outsourcing Accounting	\$30,700
2. Contract out Youth Services Position	\$15,902
3. Co-sponsor webinars	\$6,300
4. Delivery for CESA3 school districts	\$11,730
5. WPLC OverDrive Collection	\$1,125,010
6.	

COLLABORATIVE ACTIVITIES (cont'd.)

7.		
8.		
9.		
10.		
Cost Benefit Total		\$1,189,642

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 2017.

Name of System Director Krista L. Ross	Signature of System Director ➤ <i>Krista L Ross</i>	Date Signed 9-14-16
Name of System Board President Steve Kleisath	Signature of System Board President ➤ <i>[Signature]</i>	Date Signed 9-14-16

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 See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature ➤ <i>[Signature]</i>	Date Signed 11-8-16
Comments		

PUBLIC LIBRARY SYSTEM 2017 ANNUAL PROGRAM BUDGET					
Program	2017 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	\$26,050			\$154,175	
2. Reference/ILL	\$13,912				
3. Technology	\$83,380	\$4,633	\$6,574	\$28,417	
4. Electronic Resources	\$10,814		\$12,596	\$24,990	
Program Total	\$134,156	\$4,633	\$19,170	\$207,582	\$365,541
Continuing Education and Consulting Service*					
1. Continuing Education	\$30,476				
2. Consulting	\$27,804				
Program Total	\$58,280	\$0	\$0	\$0	\$58,280
Delivery Services	\$76,093	\$14,000		\$33,131	\$123,224
Library Services to Special Users	\$13,781				\$13,781
Library Collection Development	\$5,859			\$5,250	\$11,109
Direct Payment to Members for Nonresident Access					\$0
Direct Nonresident Access Payments Across System Borders					\$0
Library Services to Youth	\$9,437				\$9,437
Public Information	\$27,676				\$27,676
Administration	\$38,059	\$6,500		\$3,500	\$48,059
Subtotal	\$170,905	\$20,500	\$0	\$41,881	\$233,286
Other System Programs					
1. Designated Funds		\$113,233		\$327,778	\$441,011
2.					\$0
Program Total	\$0	\$113,233	\$0	\$327,778	\$441,011
Grand Totals	\$363,341	\$138,366	\$19,170	\$577,241	\$1,098,118

* 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 4 is reserved for the amounts budgeted for electronic resources (see Program Budget Guidelines).

Designated Fund Allocation Balances (As of August 31, 2016):

Building Reserve: Balance: \$33,916.17 The purpose of this fund is to provide for physical improvements to the leased space and replacement of office equipment as well as act as a contingency fund for future rental obligations. SWLS plans to use up to \$6500 for a replacement photocopier in 2017. \$8,835.14 is state aid carryover and \$25,081.03 is other income carryover (sale of building in 2012).

Vehicle Reserve: Balance:\$23,660.25 The purpose of this fund is to replace the delivery van every 2-3 years and act as a contingency fund for the delivery expenditures. In 2017, there are plans to replace the oldest delivery van using up to \$14,000 from this reserve. Entire balance is state aid carryover.

Net Southwest Reserve: Balance:\$37,262.65 This account is funded from contributions by the 27 public libraries that make up the Net Southwest Consortium. The purpose of this fund is to provide for capital upgrades to the ILS (both hardware and software) and the wide area network that supports it. Entire balance is other income carryover.

Technology Reserve: Balance:\$16,812.80 This account is funded from contributions by the 27 public libraries that contract for technology services from SWLS. The purpose of this fund is to provide for capital upgrades to the wide area network as well as offset start up costs for new technologies. Entire balance is other income carryover.

Reserve Account-General: Balance:\$270,266.30 The purpose of this account is to act as a contingency account for the current and future operating budgets. \$21,644.56 is state aid carryover and \$248,621.74 is other income carryover (sale of building in 2012).

Unfunded Benefits Reserve: Balance:\$55,614.19 The purpose of this account is to cover any payouts for benefits owed to an employee upon retirement or position elimination if applicable. Entire balance is state aid carryover.

SWLS Computer Reserve: Balance:\$3478.58 The purpose of this account is to facilitate the timely replacement of staff computers, the laptop lab and presentation package as well as provide funding for needed software purchases. Entire balance is state aid carryover.