

Budget Bill Language Referring to Library System Study:



This is the language that had been added to the 2014-15 Budget Bill by the Committee on Joint Finance, but was vetoed by the Governor:

STUDY OF PUBLIC LIBRARY SYSTEMS

(a) The department of administration, in consultation with the department of public instruction, shall conduct a study of public library systems in this state to identify the potential for savings by doing the following:

- 1. Consolidating systems.**
- 2. Increasing the use of technology.**
- 3. Reducing duplications and inefficiencies.**
- 4. Utilizing lean production principles.**
- 5. Increasing the sharing of services among library systems.**

(b) By July 1, 2014, the department of administration shall submit a report of the study under paragraph (a) to the co-chairpersons of the joint committee on finance.

Lean System Study Work Group Structure

Project Sponsor
Department of Public Instruction

| | |
|--------|------------------|
| COLAND | Project Champion |
| SRLAAW | Project Advocate |
| WLA | Project Advocate |

The **Executive Sponsor** ensures alignment with organizational strategies and provides high level direction to the project. Has ultimate authority over the project and is responsible to the business for its success. The Executive Sponsor secures project funding, resolves issues and risks at the executive level, and is a champion of the project across the organization.

Executive Sponsor
Kurt Kiefer

LEAN Library System Core Team

Business Owner
Team Lead
Director,
Public Library Dev
John DeBacher

The **Business Owner** has ultimate responsibility for the overall business success of the project (processes and systems). Owns business decisions throughout the project, ensures that stakeholders are appropriately engaged, and that the project results meets the needs of the business. Has ongoing ownership of the project deliverables/results

Director
Waukesha County
Federated Library System
Connie Meyer

Director
Southwest Wisconsin
Library System
Krista Ross

Asst. Director
Appleton Public Library
Tasha Saecker

Verona Public Library
Brian Simons

**Community
Liaison/Public Libraries
WiLS**
Bruce Smith

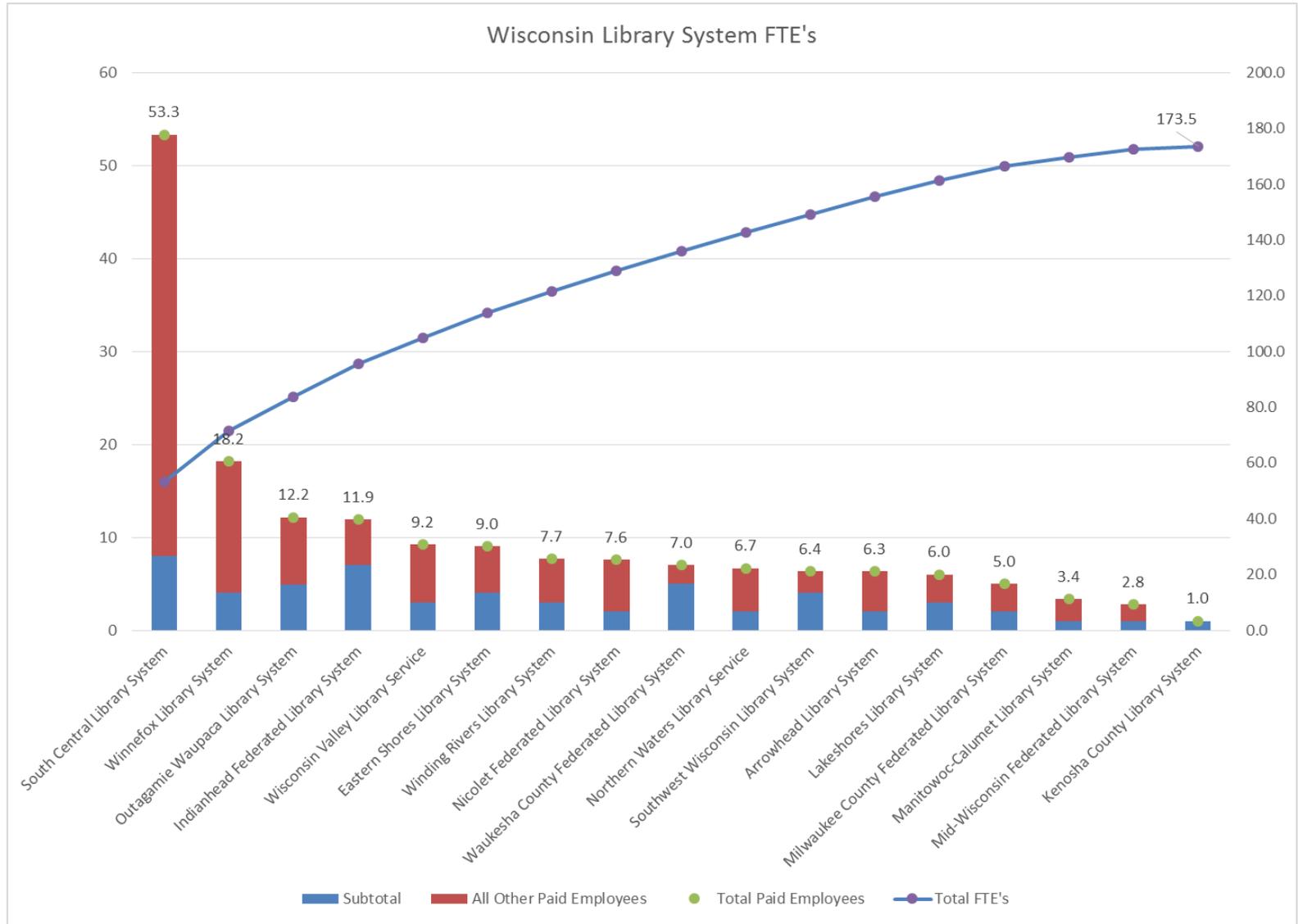
Director
Indianhead Federated
Library System
John Thompson

**Public Library Admin
Consultant**
Denise Anton
Wright

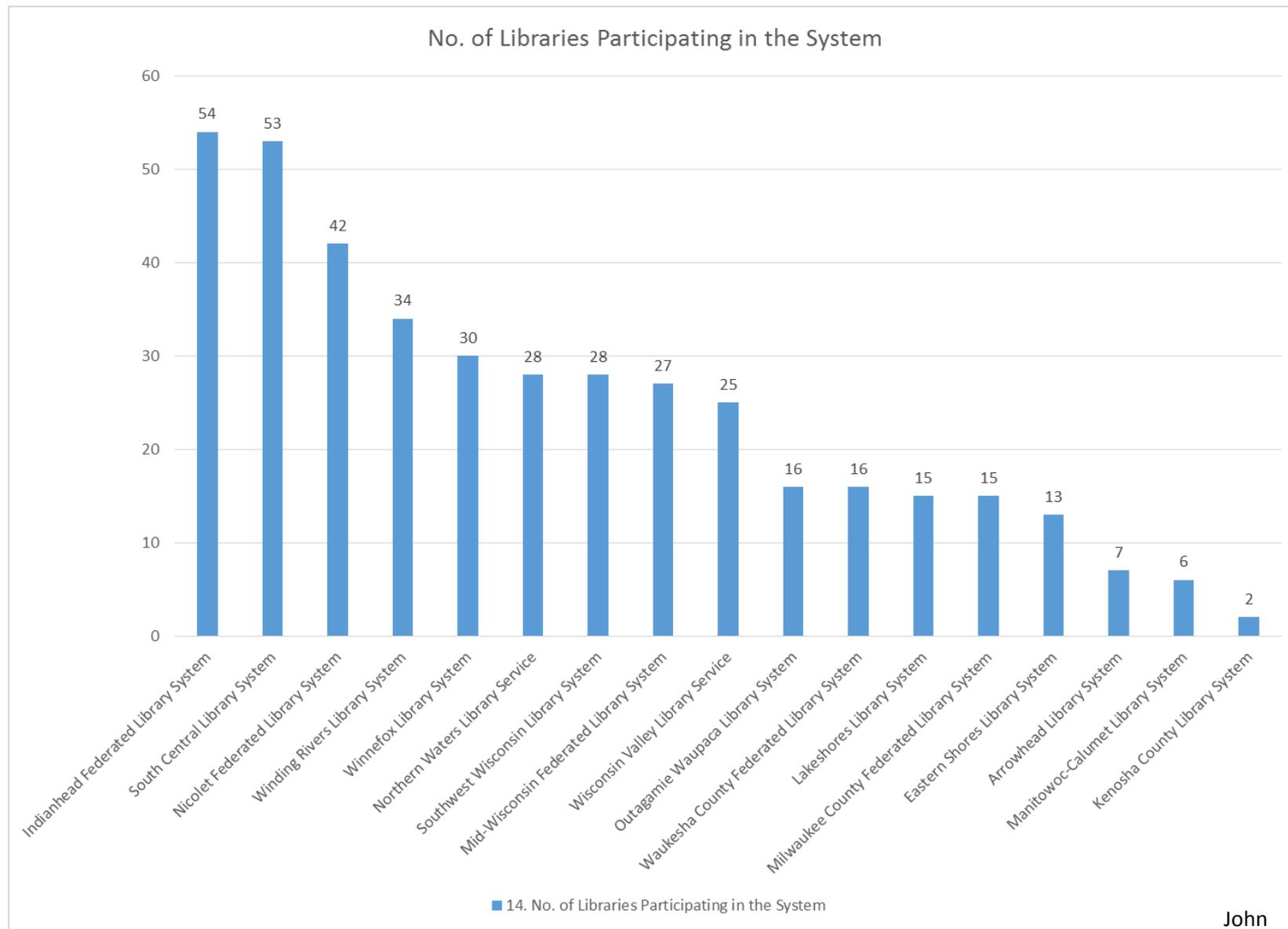
Facilitator
Reinvention, LLC
Walter
Jankowski

Co-Facilitator
Matthew
Conway

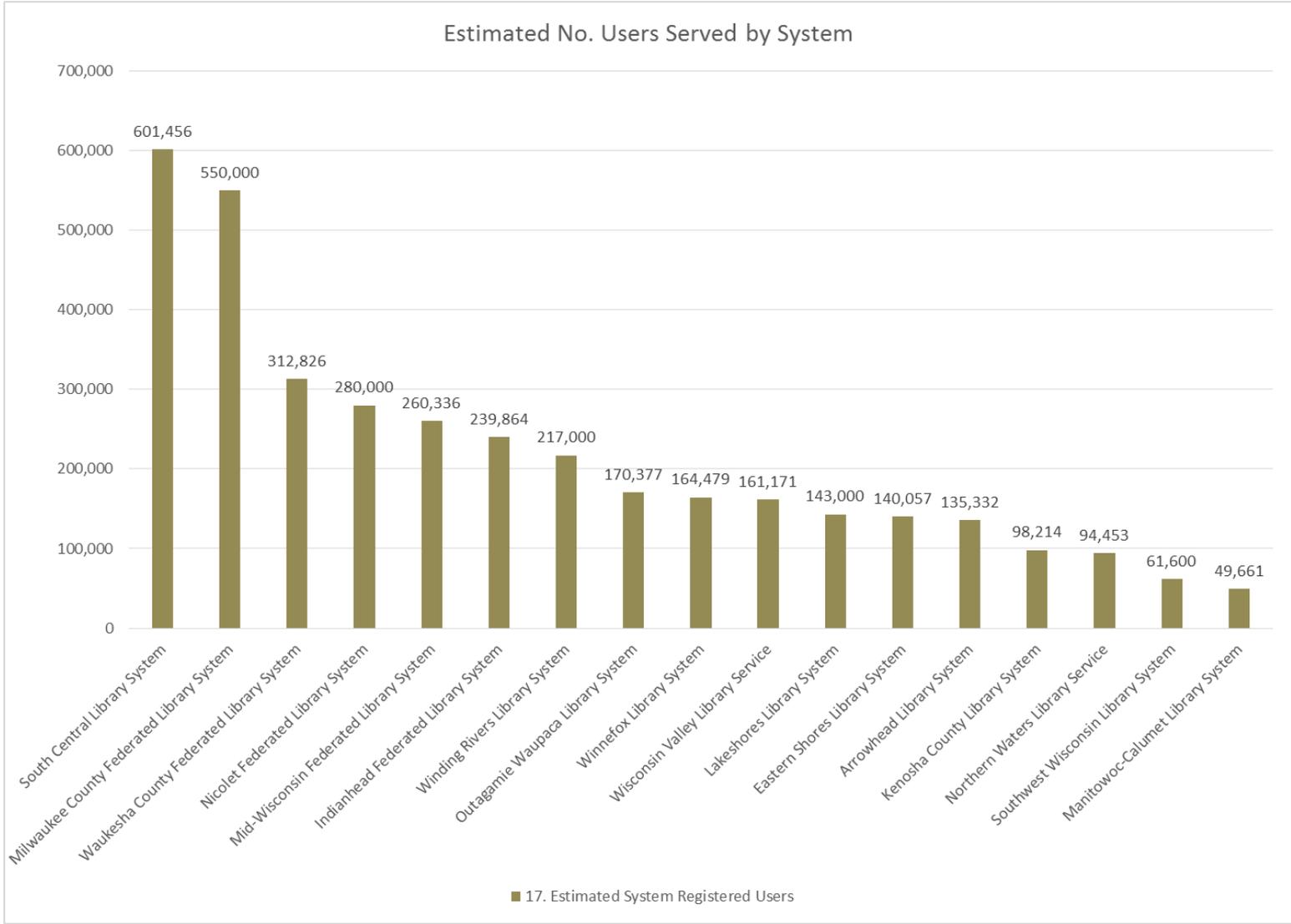
Library System FTE's



Libraries in System



Estimated Users By System



Statutory Duties of Public Library Systems

- <http://docs.legis.wisconsin.gov/statutes/statutes/43/24/2>
- (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:
 - (a) Written agreements that comply with s. 43.15 (4) (c) 4. with all member libraries.
 - (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.
 - (d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.
 - (e) In-service training for participating public library personnel and trustees.
 - (f) Electronic delivery of information and physical delivery of library materials to participating libraries.
 - (g) Service agreements with all adjacent library systems.
 - (h) Professional consultant services to participating public libraries.
 - (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.
 - (k) Promotion and facilitation of library service to users with special needs.
 - (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.
 - (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 by every 5th January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
 - (n) That, if the system reimburses a participating public library for the costs of providing interlibrary borrowing services to an individual who holds a valid borrower's card of another participating public library, the reimbursement shall not exceed the actual costs incurred by the public library in providing such services. The department shall promulgate rules for determining actual costs for the purposes of this paragraph.

Background Resources

| Resource | Description | Summary of Key Learnings |
|--|---|--|
| <p>“Creating More Effective Library Systems” – 2013 SRLAAW Report http://www.srlaaw.org/2013Process/process.asp -</p> | <ul style="list-style-type: none"> In 2013, System and Resource Library Administrators Association of Wisconsin (SRLAAW) undertook a multi-part process to determine how public library systems can remain most effective in meeting member library needs into the future. The process began with a visioning summit of stakeholders representing library systems, public libraries and resource libraries. Additional feedback was gathered from surveys on six system service areas. A preliminary report was issued by the committee in May 2013 for review and comment by surveys, group discussions and targeted interviews. The preliminary report was revised based upon the feedback provided and submitted to SRLAAW for their approval at their August 2013 meeting. | <ul style="list-style-type: none"> Sections of Chapter 43 are outdated and may hamper delivery of effective service and/or constrain system responsiveness Current collaborative efforts are underreported Library systems provide mandated services at varying levels Lack of consensus of what is the optimal size for library systems Basic service standards as well as administrative standards should be implemented for library systems to help ensure a basic level of service to all member libraries |
| <p>System Plans & 2012 Library System information</p> | <ul style="list-style-type: none"> Each year the systems have to do a “plan” for the DPI KEY LEARNINGS 8 systems serve 16 libraries or less with 3 systems serving 7 or less. Kenosha stands alone wrapping system services into the library services. South Central Library System stands alone as the most expensive system, the assumption is that it’s due to running statewide delivery. 10 systems serve 170,377 or less registered users. 4 Systems serve less than 98,215 users each. What’s not shown is geographic distance measured in square miles or some other measure. What is missing is what ILS (or ILSes) each system is running and the number of libraries on each ILS as a consortium and the number of stand-alone libraries. | <ul style="list-style-type: none"> While the number of System licensed databases is available, the names of those databases is absent. Significant overlap may be present. If system consolidation is done, the money saved could result in greater gains (all databases for all systems) versus the greater losses, but we can’t analyze that until we know what the database titles are. Out of system ILL statistics need to be gathered. Costs for ILL need to be gathered. If we have a statewide delivery, can we find an efficient statewide out of ILS secondary ILL mechanism that is more efficient? |
| <p>Wisconsin Legislative Audit Bureau’s April 2008 “Best Practices Review: Public Library Services”</p> | <ul style="list-style-type: none"> A best practices review of local government operations, as directed by s. 13.94(8), Wis. Stats. The 17 regional library systems are statutorily required to provide specific services, such as interlibrary loans of materials, reference assistance, and consulting services to member libraries. Consulting services include assistance with promoting library use, addressing the needs of users with special needs, and evaluating current and future building and space requirements. The regional library systems also provide libraries with technology support, which includes troubleshooting and consulting for purchases of software and hardware. More than one-half of the libraries surveyed indicated an online catalog is the most valuable service provided by their regional library system. | <ul style="list-style-type: none"> Encourage all member libraries to participate in online catalogs (p. 34); Assist member libraries in maintaining current info technology (p. 36); Periodically identify services needed by member libraries’ patrons (p. 39); Periodically evaluate the type & amount of services provided by resource libraries and assess whether the \$ for the services is appropriate (p. 41); and Explore collaboration with other systems for efficient and lower-cost delivery of services (p. 42). |
| <p>January 2005 - Wisconsin Public Library System: Size and Organization</p> | <ul style="list-style-type: none"> A Report Prepared for the Division for Libraries, Technology, and Community Learning (by the UW-Madison School of Library & Information Studies) | <ul style="list-style-type: none"> A system comprised of Arrowhead, Kenosha, & Lakeshores would be a scenario worth examining. Dividing the SWLS and merging Iowa and Lafayette with SCLS and remaining three with WRLS |
| <p>2001 SRLAAW Unifying Vision for Library Services</p> | <ul style="list-style-type: none"> SRLAAW Process led to 24/7, WPLC R&D, minimum standards for libraries, Badgercard | <ul style="list-style-type: none"> Rethinking System Structure: No action was taken |

Process Improvement Methodology

Proposed
Project

0

Organize Team

- What's the high-level problem, goals, and objectives?
- Who should be on the team?
- Meeting Logistics

1

Define

- ✓ Who's the customer?
- ✓ What do they need?
- ✓ What's the problem?

2

Measure

- ✓ How big is the current problem?
- ✓ How often, when, how many, etc.?

3

Analyze

- ✓ Why is the problem happening?
- ✓ How do you know?

4

Improve

- ✓ Develop Solutions
- ✓ Redesign Process
- ✓ Develop Recommendations
- ✓ Approve
- ✓ Implement

5

Control

- ✓ How will you make sure it will stick?

Track, Update, and Provide Status

Improvement
Project
Implemented

LEAN Library System Process

High-Level Process for Improving Wisconsin Library Systems

Library System Opportunities

1

Define Project Scope

- ✓ Define Team
- ✓ Learn about LEAN and DMAIC
- ✓ Define team deliverables
- ✓ Define approach

2

Gather Past Work and Data

- ✓ SRLAAW
- ✓ LSTA Public Library System Study
- ✓ Wisconsin Legislative Audit Bureau
- ✓ UW

3

Determine System Services & Core Processes

- ✓ What services are mandatory?
- ✓ Find overlap and redundancies of mandatory (or otherwise) services.

4

Determine Current State & Costs

- ✓ How does each system do it
- ✓ Where is there variation?
- ✓ Where is there opportunity
- ✓ Costs

5

Develop Options & Recommend.

- ✓ What's the options / best ways to deliver services?
- ✓ Determine costs / potential savings
- ✓ Develop recommendations

6

Develop Execution Plan

- ✓ Get approvals
- ✓ Develop plan to execute

7

Track, Update, and Provide Status

- ✓ Periodic updates to LD&L, SRLAAW
- ✓ Executive Sponsors and Steering Committee

Plan to Execute



Work Group Overview and Process

The work of the DPI Lean System Study Work Group was not to duplicate the studies of the last 20 years and add one more voice to the chorus that think there can and should be a consolidation of the number of public library systems in Wisconsin. Instead, the work group studied this from a lean practices perspective considering capacity, resource and demand analysis to imagine new models to deliver the different services currently provided by systems. The goal is to achieve the desired outcome of maximizing the return on the investment of the services delivered to the customer, which in the case of systems are public libraries. The intent is to improve services to libraries to help libraries deliver the best services they can to patrons.

This study took into account modern technologic and logistical capabilities that could better align service delivery with the current and future needs of libraries based upon standards and standardization, and service expectations of the libraries of the various communities in Wisconsin. The result could be some services delivered centrally via libraries; systems or system like organizations; federal, state, county or municipal agencies; academic partners; non-profit organizations and agencies or private vendors and contracted services.. It also could be that some are delivered regionally with the same options for potential service providers. These models already exist with WPLC, the CE offerings currently coordinated by systems outside of existing system borders, and statewide delivery.

After potential new service delivery models are developed and tested, it is then, according to the lean principles followed by this work group, that we can determine what administrative and organizational support infrastructure needs to be in place to most effectively and efficiently support the delivery of the services. The DPI Lean System Study Work Group acknowledges that the expenditures shown are approximate amounts based upon estimates and self-reported information, but they provided a sufficient framework to identify where efficiencies can be achieved.



General Recommendations

1. COLAND work group and DLT staff continue as the System Services Redesign Steering Committee (SSRSC), the project champions. SRLAAW and WLA act as project advocates
2. A project manager should be hired to work with the SSRSC to aid the process and ensure the work of exploring and implementing alternative service delivery models is thoroughly executed and is both inclusive and transparent.
3. Work groups should be formed to explore and redevelop service delivery models of services currently provided by public library systems. It is recommended these work groups are populated by the SSRSC with the following suggestions for inclusion:
 - a. DLT staff should be assigned as liaisons to each work group.
 - b. Experts of a particular service from within the library community.
 - c. Stakeholders of the service: those that receive the service, provide the service and fund the service.
 - d. Representation, as best as possible, that is from different systems, libraries and organizations representing different regions and sizes.
4. A general time line is recommended as follows:
 - a. By the end of 2014: SSRSC and DLT identify funding resources for project management in 2015. This is to fund a project manager, work group meeting expenses and make funds available, as needed, for information gathering and use of outside expertise. Also, the SSRSC should communicate with the LSTA Advisory Committee to identify possibilities for LSTA funds to be allocated for this project for 2016.
 - b. 2015 and 2016: Service work groups complete recommendations including new service models, pilot of new models as possible and implementation plans. Note, specific time line and activities of each work group should be determined by the SSRSC, project manager and service work group. It is recommended that the following be considered when determining the process and time line of the work groups.
 1. The first three that should be started are Technology, Delivery & CE
 2. The work of the Technology and Delivery work groups should be done before ILS.
 3. CE should be done before Library Consulting.
 4. Any reconsideration of secondary ILL should be done in relation to ILS.
 - c. 2017: A work group is formed to do a full review of Chapter 43 and a PL system review to determine number, make up and role of systems and coordinated library service providers needed after new service delivery models are determined.
5. Incentivize consolidation of services to be delivered in a coordinated manner either regionally or centrally.
6. Develop Standardized Regional Service layers for improved Delivery, IT, CE and Consulting. Allocate appropriate fiscal resources to support regional layers of service.



Individual Service Areas and Recommendations

Wisconsin Public Library System Core Process DPI OWNERS

Services Provided from 5,000 Feet

library system core processes

| Denise | Ryan / Kurt | Stef | Martha | Bruce | Lisa | Terrie | John |
|---|--|---|---|---|--|---|--|
| 1 Provide Professional Library Consulting <i>Consultation on Administrative & Library services delivery</i> Library administration and personnel Web Design, Marketing, PR Children's Services PR/Advocacy Long Range and Space Planning Help with ADA Compliance Adaptive Equipment Services (ESL, Literacy, Special Pop.) | 2 Provide & Support Library Technology <i>Provide & coordinate Library IT infrastructure</i> Provide Network Infrastructure (T1, routing, etc.) Coordinate Hardware Purchases Coordinate Software Purchases Oversee System-wide implementations Manage social media presence Maintain equipment Technology Innovation | Facilitate Resource Sharing | | | 4 Coordinate Electronic Resources <i>Assess needs, coordinate purchases, and access to electronic resources</i> e-books and e-audio streaming Provide and manage access to e-books, streaming audio and video, and e-magazines Provide access to online Databases | 5 Coordinate & Provide Continuing Education <i>Coordinate & certify library training for personnel & Trustees</i> Plan & develop curriculum on current issues Encourage participation Plan and coordinate training logistics and format Provide Director and Trustee Orientation Provide Awareness of Trends and Opportunities Provide content for Certification Track & Report Certification Progress | 6 Manage System Administration Funding & Overhead <i>Operate effective system according to state law</i> Advance collective goals Facilitate cost savings opportunities to member libraries Ensure access to reports and data Evaluate and improve system services Educate and inform System Boards Manage Fiscal Resources Supervise System Personnel Market and promote system services Coordinate system staff development |
| | | 3A Provide and Manage ILS <i>Manage system platform to share resources across libraries</i> Manage hardware and software (database) Ensure cataloguing quality control Be Fiscal Agent Provide Training on ILS Implement ILS updates Coordinate consortia agreements Provide and maintain procedural integrity Provide patron access to resources | 3B Provide Secondary ILL & "Back-up" Reference <i>Provide items that are not available in your ILS</i> Support WisCat use Coordinate and support OCLC use Contract with Resource library for Back-up reference Support development of Specialized collections | 3C Coordinate & Provide Physical Delivery <i>Distribution and transportation of library materials</i> Provide delivery within local system Provide delivery Statewide system Manage and coordinate delivery services Sharing materials Route resources | | | |

Wisconsin Public Library System Core Process COSTS

Services Provided from 5,000 Feet

library system core processes

| \$2.2M | \$3.3M | \$6.8M | \$1.1M | \$4.2M | \$2.3M | \$0.58M | \$2.3M |
|---|---|---|---|--|--|---|--|
| 1 Provide Professional Library Consulting | 2 Provide & Support Library Technology | Facilitate Resource Sharing | | | 4 Coordinate Electronic Resources | 5 Coordinate & Provide Continuing Education | 6 Manage System Administration Funding & Overhead |
| <i>Consultation on Administrative & Library services delivery</i> | <i>Provide & coordinate Library IT infrastructure</i> | 3A Provide and Manage ILS | 3B Provide Secondary ILL & "Back-up" Reference | 3C Coordinate & Provide Physical Delivery | <i>Assess needs, coordinate purchases, and access to electronic resources</i> | <i>Coordinate & certify library training for personnel & Trustees</i> | <i>Operate effective system according to state law</i> |
| Library administration and personnel | Provide Network Infrastructure (T1, routing, etc.) | Manage hardware and software (database) | Support WisCat use | Provide delivery within local system | e-books and e-audio streaming | Plan & develop curriculum on current issues | Advance collective goals |
| Web Design, Marketing, PR | Coordinate Hardware Purchases | Ensure cataloguing quality control | Coordinate and support OCLC use | Provide delivery Statewide system | Provide and manage access to e-books, streaming audio and video, and e-magazines | Encourage participation | Facilitate cost savings opportunities to member libraries |
| Children's Services | Coordinate Software Purchases | Be Fiscal Agent | Contract with Resource library for Back-up reference | Manage and coordinate delivery services | Provide access to online Databases | Plan and coordinate training logistics and format | Ensure access to reports and data |
| PR/Advocacy | Oversee System-wide implementations | Provide Training on ILS | Support development of Specialized collections | Sharing materials | | Provide Director and Trustee Orientation | Evaluate and improve system services |
| Long Range and Space Planning | Manage social media presence | Implement ILS updates | | Route resources | | Provide Awareness of Trends and Opportunities | Educate and inform System Boards |
| Help with ADA Compliance | Maintain equipment | Coordinate consortia agreements | | | | Provide content for Certification | Manage Fiscal Resources |
| Adaptive Equipment | Technology Innovation | Provide and maintain procedural integrity | | | | Track & Report Certification Progress | Supervise System Personnel |
| Services (ESL, Literacy, Special Pop.) | | Provide patron access to resources | | | | | Market and promote system services |
| | | | | | | | Coordinate system staff development |

Higher potential opportunities

1. Provide Professional Library Consulting

| Services Library Systems Deliver | Key Stakeholder | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|--|---|--|---|---|
| <p>1. Provide Professional Consulting</p> <ul style="list-style-type: none"> <input type="checkbox"/> Professional consultation with Administration and service deliveries <input type="checkbox"/> Children’s Services <input type="checkbox"/> Web Design <input type="checkbox"/> Marketing <input type="checkbox"/> Public Relations <input type="checkbox"/> Advocacy <input type="checkbox"/> Personnel <input type="checkbox"/> Awareness of what’s coming | <ul style="list-style-type: none"> • Systems • YS Librarians • Marketing Personnel • System Directors • Library Administration Support Staff • Member Library Staff • Other System Staff • Other Systems’ Staff | <p>A. System delivers services to its member libraries themselves</p> <p>B. Contractual Arrangements with other Systems</p> <p>C. Community of Sharing</p> | <p>A. Annual Report</p> <p>B. System Director and Annual Report</p> <p>C. Formal, informal, and parasitic.</p> | <ul style="list-style-type: none"> • Real Consultant Pool (centralized). • Standards for consultants • Better developed sharing environment. • Resource/Document development. |
| <p>Consult and Address Special Needs</p> <ul style="list-style-type: none"> <input type="checkbox"/> Help with ADA compliance <input type="checkbox"/> Equipment and facilities <input type="checkbox"/> Services (ESL, literacy, special populations, etc.) | <ul style="list-style-type: none"> • Persons with Special Needs • Special Needs Consultants at the System • Member Libraries • DPI | <ul style="list-style-type: none"> • LSTA funds diluted through many libraries in a system or statewide. • Workshops • Assessments • Apathy and Reactive | <p>Mostly zero cost except Personnel at the system level, because it’s mostly grant funded other than the personnel. The need is at the library level and those costs could be factors.</p> | <ul style="list-style-type: none"> • Proactive • *Outreach services at the Local Level. • Regional Consultant • Partner with other agencies (Literacy Network-ESL, Hearing Loop Group, Aging Centers, etc.) |

1. Provide Professional Library Consulting

| Wisconsin State Library System | | 1. Provide Professional Library Consulting | | | | | |
|---|------------|--|--------------------|--------------------------|--------------------|------------------------------|---|
| 1. System Name | # of staff | % of work on Consulting | Total Salary | Benefits Travel estimate | Total Costs | Total staff hours on Consult | Response |
| Arrowhead Library System | 4 | varies | \$34,775 | \$10,433 | \$45,208 | 1,394 | Dir 22%; YS 10%; SN 20%; Tech 15% |
| Eastern Shores Library System | 3 | varies | \$17,816 | \$5,345 | \$23,161 | 636 | Admin 5%; Tech 13%; YSN 12.6% |
| Indianhead Federated Library System | 3 | varies | \$80,670 | \$24,201 | \$104,871 | 2,704 | not received. 40% dir; 50% YSN; 40% Lserv Cons |
| Kenosha County Library System | 1 | 10% | \$8,000 | \$2,400 | \$10,400 | 208 | 10% of director's time |
| Lakeshores Library System | 5 | varies | \$95,900 | \$28,770 | \$124,670 | 1,924 | Dir 30%;Tech 40%; Jan 10%; Vicki 10%; Jen P 50% (of 5%pos) |
| Manitowoc-Calumet Library System | 3 | varies | \$33,750 | \$10,125 | \$43,875 | 1,456 | est. dir .15; netw admin .2 |
| Mid-Wisconsin Federated Library System | 3 | varies | \$78,195 | \$23,459 | \$101,654 | 3,016 | Dir 10%; Tech 40%; tech 90%; asst 5% |
| Milwaukee County Federated Library System | 3 | varies | \$42,800 | \$12,840 | \$55,640 | 1,144 | Dir 10%; Tech 30% Asst d 5% |
| Nicolet Federated Library System | 4 | varies | \$109,890 | \$32,967 | \$142,857 | 4,160 | Dir 30% YSN 10%; Tech 80%; ILL 80% |
| Northern Waters Library Service | 3 | varies | \$53,000 | \$15,900 | \$68,900 | 1,080 | No response--est |
| Outagamie Waupaca Library System | 7 | varies | \$100,610 | \$30,183 | \$130,793 | 4,472 | Dir 40%; Tech 70%; Outr 35%; Graph 20%; Tech 40%; Youth 10%; Netw 10% |
| South Central Library System | 6 | varies | \$307,425 | \$92,228 | \$399,653 | 9,672 | Dir 20%; ConEd 85%; YSN 90%; Design 95%; MarkI 85%; WebServ 90% |
| Southwest Wisconsin Library System | 2 | 40% | \$50,000 | \$15,000 | \$65,000 | 832 | No response |
| Waukesha County Federated Library System | 3 | varies | \$44,200 | \$13,260 | \$57,460 | 1,248 | Dir 10%; Tech 20%; YSN 40% |
| Winding Rivers Library System | 2 | varies | \$55,000 | \$16,500 | \$71,500 | 1,000 | No response: est |
| Winnefox Library System | 8 | varies | \$307,425 | \$92,228 | \$399,653 | 3,661 | AsstDir 70%; DBappDev 15%; NetMgr 10%; PCSup 38%; Admin 3%; Cont Ed 15%; WCTS 25% |
| Wisconsin Valley Library Service | 6 | varies | \$307,425 | \$92,228 | \$399,653 | 6,864 | Dir 20%; Admin 65%; |
| Total | 66 | | \$1,726,881 | \$518,064 | \$2,244,945 | 45,471 | |
| | | | | | FTE's | 22.7 | |

1. Provide Professional Library Consulting Recommendations & Next Steps

Background / Assumptions

- Statutory requirement: System must provide “(h)Professional consultant services to participating public libraries”
 - From a survey of systems regarding their personnel and percentage of time devoted to consulting: over \$1.6 million of state aid and nearly 22 FTE positions are devoted to consulting.
 - Not all people involved in providing the services can be considered professionals or experts in the areas they consult in. Legislative interpretation and guidance is inconsistent, based on follow-up questions directed to the DPI.
 - There is considerable overlap consulting among systems, and other areas where many systems provide very little or no consulting.
 - Definition of consulting areas, necessary skills and expertise required would help to provide a context for improvement of delivery.
4. By establishing minimum requirements for consulting areas, systems would be more likely to contract with member libraries to ensure qualified staff address specific areas (such as youth services, special populations, library administration, planning, and policy development).
 5. Legislative amendments or administrative rule authority would be required to ensure reform takes place. Suggestion: *“Provide or contract for professional consultant services to participating public libraries in areas as defined by the division.”*
 6. Funding: Alternately, system aid could be proportionately reduced and the division instead administer a program for larger regional consulting areas based on CE zones or delivery hubs.
 7. Alternately, expand state-level consulting pool with regional offices (not realistic in current budgetary climate).
 8. Develop expert pool of specialized consultants and professionals for broad or elaborate local needs.
 9. Appoint a team to review consulting scope and definition (Q4 2014)
 - Investigate consulting delivery and scope in other states
 - Determine broad areas of consulting and how those could be met in larger regions or statewide
 10. Share recommendations with library community and make adjustments as necessary.

Recommendations

1. Either an established group or one appointed by the DPI would determine consulting areas and define the scope and skills required to address questions.
2. Determine a way to identify experts throughout the state who can serve in a resource directory for consulting. Suggest a service tree from local to regional experts to state consultants for addressing questions.
3. Provide an electronic forum space for moderated discussion topics where queries can be address and elaborated upon, which can then serve as a future resource.

Determine regional zones for consulting services for accurate answers but also ability to make site visits as required for localized needs. Determine when costs may be collected or charged for over-and-above services.

2. Provide & Support Library Technology

| Services Library Systems Deliver | Key Stakeholder | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|--|-----------------|--|---|--|
| 2. Provide & Support Technology Hardware Network (T1, etc.) Software Implementation | | State: <ul style="list-style-type: none"> DPI/LSTA/TEACH WiscNet | <ul style="list-style-type: none"> Staff Positions Subsidy Costs (TEACH/LSTA) | Cooperative Purchasing for equipment, services, and Licenses (State-Vendornet) |
| | | Regional Community-Area Networks | <ul style="list-style-type: none"> Membership Fees/Dues Build-up costs (Fiber, Equipment) | Regional or State-Wide Hosting <ul style="list-style-type: none"> Multi-type Partnerships |
| | | System: <ul style="list-style-type: none"> Tech Coordinator Network Support Staff PC Support System Directors (and Board) System System Staff (Internal) | <ul style="list-style-type: none"> Staff Costs Equipment Costs Space Infrastructure Contracted Costs | Better way to utilize & coordinate expertise @ local/system level |
| | | Local: <ul style="list-style-type: none"> Library Director and Board All Staff Municipal Support/IT Private Vendor Contracts- (PC Support/Network) Patrons | <ul style="list-style-type: none"> Staff Costs Equipment Costs Space Infrastructure Contracted Costs | |

2. Provide & Support Library Technology

| Wisconsin State Library System | 2. Provide & Support Library Technology | | | | | | | Overall Annual Expenditures | | Grants |
|---|---|--------------------|------------------|---------------------|--------------------------|---------------------------|---------------------------------|-----------------------------|-----------------|--------|
| 1. System Name | IT FTE | IT Wages | IT Benefits | Total IT Staff Cost | Nonstaff IT Expenditures | State Aid IT Expenditures | IT Services Billed to Libraries | Total IT Expenditures | LSTA Funds | |
| Arrowhead Library System | 0.45 | \$21,721 | \$7,895 | \$29,616 | | \$31,463 | \$13,053 | \$44,516 | | |
| Eastern Shores Library System | 0.5 | \$25,456 | \$5,512 | \$30,968 | | \$55,910 | \$35,991 | \$91,901 | \$16,186 | |
| Indianhead Federated Library System | 1.66 | \$78,397 | \$54,683 | \$133,080 | \$25,360 | \$158,440 | \$0 | \$158,440 | | |
| Kenosha County Library System | 0 | \$0 | \$0 | \$0 | | \$132,500 | \$0 | \$132,500 | | |
| Lakeshores Library System | 2 | \$124,655 | \$50,000 | \$174,655 | | \$174,655 | \$10,000 | \$184,655 | | |
| Manitowoc-Calumet Library System | 0.75 | \$44,788 | \$3,425 | \$48,213 | | \$87,000 | \$13,175 | \$100,175 | | |
| Mid-Wisconsin Federated Library System | 2 | \$105,000 | \$30,502 | \$135,502 | | \$156,702 | \$43,003 | \$199,705 | | |
| Milwaukee County Federated Library System | 1.25 | \$101,268 | \$47,493 | \$148,761 | | \$38,800 | \$15,000 | \$53,800 | | |
| Nicolet Federated Library System | 1 | \$40,000 | \$8,000 | \$48,000 | | \$127,250 | \$136,050 | \$263,300 | | |
| Northern Waters Library Service | 0.5 | \$20,000 | \$4,000 | \$24,000 | | \$161,698 | \$45,466 | \$207,164 | | |
| Outagamie Waupaca Library System | 0.975 | \$45,004 | \$11,600 | \$56,604 | | \$84,318 | \$0 | \$84,318 | | |
| South Central Library System | 8.05 | \$496,618 | \$182,550 | \$679,168 | | \$234,000 | \$745,122 | \$979,122 | | |
| Southwest Wisconsin Library System | 0.65 | \$21,249 | \$13,448 | \$34,697 | | \$43,864 | \$27,118 | \$70,982 | | |
| Waukesha County Federated Library System | 0.10 | \$7,609 | \$3,091 | \$10,700 | | \$70,137 | \$0 | \$91,537 | | |
| Winding Rivers Library System | 0.85 | \$33,981 | \$16,446 | \$50,427 | \$11,219 | \$70,221 | \$0 | \$70,221 | | |
| Winnefox Library System | 2.65 | \$130,612 | \$67,894 | \$198,506 | | \$152,921 | \$119,225 | \$272,147 | | |
| Wisconsin Valley Library Service | 1.72 | \$83,262 | \$42,804 | \$126,066 | | \$123,442 | \$101,962 | \$280,575 | | |
| Total | 25.10 | \$1,379,620 | \$549,343 | \$1,928,963 | \$36,579 | \$1,903,321 | \$1,305,165 | \$3,285,058 | \$16,186 | |

2. Provide & Support Library Technology

Recommendations & Next Steps

Background / Assumptions

1. The support of networks; computers; and applications are an integral part of system services and are vital to the residents of Wisconsin.
2. A well managed robust technology infrastructure provides the backbone for resource sharing; electronic resources; and Internet access for libraries and the citizens of Wisconsin.
3. With technology moving towards the cloud and hosted applications it reduces or eliminates current physical system service boundaries. Library Systems working in partnership with the Division for Libraries and Technology are encouraged to develop pilot lean technology projects to demonstrate the impact of regional and/or statewide standardization of hardware and applications and their support.
4. We recognize the efforts of the Department of Administration and the Department of Public Instruction to provide bandwidth to support current and future library needs.
5. Public library staff should achieve and maintain core technology competencies.

Costs

- Approximately \$3.3 million is spent at the system level for technology support
 - \$1.9 million system aid
 - \$1.3 million billed to local libraries
- Does NOT Include what the local libraries do for themselves:
 - Local contracted support
 - Local Library Staff
 - Local City IT Support
- Additional technology support is provided by municipalities/counties and/or with local contracted support. There is at least \$2M* more being spent on a local library IT
- Approximately 25 FTE's

2. Provide & Support Library Technology

Recommendations & Next Steps

Recommendations

1. COLAND support inclusion of technology support as a mandated system service.
 - INSERT: 43.15 (2) (c) Network and technology support for participating libraries
 2. Form Lean Technology Implementation Work Group
 - Evaluate existing technology data and practices
 - Survey systems for additional information as needed
 3. Provide capital seed money for lean technology projects
 4. Create incentive fund of additional dollars to support general system operations for systems implementing lean technology projects to encourage library system administration support.
 5. Appoint a lean technology steering committee
 6. Convene meetings of system and resource library technology staff
 - Facilitate discussion for potential shared technology projects to promote development of regional/statewide standardization
 - Develop 3-5 year Technology Roadmap
 - Develop standards and planning for cloud
 - Develop standards and planning for broadband
 - Develop standards and planning for remote support
 - Develop standards and implement common “efficiency standards” (turning off all library computers at same time, etc.)
- Demonstrate existing shared projects
 - Provide fiscal support to attend meetings

3A. Provide and Manage ILS

| Services Library Systems Deliver | Key Stakeholder | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|---|---|--|--|---|
| <p>Facilitate Resource Sharing: 3A. Provide and Manage ILS (WiLS study)</p> <ul style="list-style-type: none"> · Manage platform to share resources across libraries · Manage hardware and software (database) · Cataloguing / quality control · Fiscal Agent · Provide Training | <p>State</p> <ul style="list-style-type: none"> • RLL&L/WISCAT <p>System:</p> <ul style="list-style-type: none"> • ILS/System Staff • System Directors (and Board) | <ul style="list-style-type: none"> • Vendor supported platform • Voluntary participation by libraries • Support varies by ILS | <ul style="list-style-type: none"> • Cost sharing varies by ILS | <ul style="list-style-type: none"> • Better way to utilize & coordinate expertise @ local/system level • Standardize budget preparation/reporting |
| | <p>Local:</p> <ul style="list-style-type: none"> • Library Director and Board • All Staff • Patrons | | | |

0

1

2

3

4

5

3A. Provide and Manage ILS (WiLS study)

See 2014 ILS Study Report by Stef Morrill (WiLS) for cost information

3A. Provide and Manage ILS

Recommendations & Next Steps

Background / Assumptions

- See WiLS Report
- 5 or 6 vendors provide shared ILS software in Wisconsin

Costs

- Consult 2014 DPI ILS Study Report
- Additional fiscal background information may be required

Recommendations

1. Consult accompanying memo of 2014 DPI ILS Study Report.
2. COLAND support inclusion of shared ILS support as a mandated system service.
 1. ADD: “43.15 (2) (j) Shared online catalog support for participating libraries”
3. Form Lean ILS Implementation Team
 - Evaluate existing ILS data and practices (WiLS report)
 - Survey systems for additional information as needed
 - Develop joint standards
 - Definitions for operations
4. Provide capital seed money for lean ILS projects
5. Create incentive fund of additional dollars to support general

system operations for system implementing lean ILS projects to encourage library system administration support

6. Convene meetings of system and resource library ILS staff
 - Demonstrate existing shared projects
 - Facilitate discussion for potential shared technology projects to promote development of regional/statewide standardization
 - Provide fiscal support to attend meetings

3B. Provide Secondary ILL & “Back-up” Reference

| Services Library Systems Deliver | Key Stakeholders | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|---|--|--|--|---|
| <p>Facilitate Resource Sharing: 3B. Provide Secondary ILL & “Back-up” Reference</p> <p>Secondary ILL – items that are not available in your ILS</p> <ul style="list-style-type: none"> • Some belong to OCLC • WisCat | <ul style="list-style-type: none"> • System ILL Staff • Library ILL Staff • Patrons | <ul style="list-style-type: none"> • WisCat (ILL) • OCLC (ILL) | <ul style="list-style-type: none"> • ILL current system costs are \$617,145 for systems reporting it, • average of \$38,571 per system | <ul style="list-style-type: none"> • ILL - Statewide ILS • Secondary ILL for academic requests that is centralized and integrated • Patron initiated ILL |
| <p>Provide “Back-up” Reference</p> <ul style="list-style-type: none"> • Manage Resource library • Provide advance level reference search • Specialized collections | <ul style="list-style-type: none"> • Resource Library, • Reference Librarians, • Member Library Staff | <ul style="list-style-type: none"> • Contracts with Resource Library | <ul style="list-style-type: none"> • Back up Reference costs are \$1,175,350 for systems reporting it, with an average of \$69,000 per system | <ul style="list-style-type: none"> • Single state-level service • Virtual and online • We should question need for resource libraries in this model |

3B. Provide Secondary ILL & “Back-up” Reference

| Wisconsin State Library System | 3B. Provide Secondary ILL & “Back-up” Reference | | |
|---|---|--------------------|---|
| 1. System Name | ILL | Back-up Reference | Comments |
| Arrowhead Library System | N/A | N/A | Nothing specific in their report for ILL or Reference |
| Eastern Shores Library System | \$30,775 | \$61,421 | |
| Indianhead Federated Library System | \$69,821 | \$69,821 | |
| Kenosha County Library System | N/A | N/A | Nothing in their report for either |
| Lakeshores Library System | N/A | \$5,000 | Nothing for ILL in their report |
| Manitowoc-Calumet Library System | \$24,000 | \$14,000 | |
| Mid-Wisconsin Federated Library System | | | |
| Milwaukee County Federated Library System | \$36,450 | \$187,390 | |
| Nicolet Federated Library System | \$87,279 | \$87,279 | Shown as single total for both services, so simply halved it in each column |
| Northern Waters Library Service | \$31,261 | \$31,261 | Shown as single total for both services, so simply halved it in each column |
| Outagamie Waupaca Library System | N/A | N/A | Nothing in their report for either |
| South Central Library System | N/A | N/A | Shown as large figure that includes technology |
| Southwest Wisconsin Library System | \$4,487 | \$4,487 | Shown as single total for both services, so simply halved it in each column |
| Waukesha County Federated Library System | \$75,911 | \$75,875 | |
| Winding Rivers Library System | \$146,244 | \$35,447 | |
| Winnefox Library System | \$45,126 | \$45,126 | Shown as single total for both services, so simply halved it in each column |
| Wisconsin Valley Library Service | N/A | N/A | Shown as large figure that includes technology |
| Total | \$551,354 | \$555,686 | |
| | | \$1,107,040 | |
| | \$55,135 | \$50,517 | Average/System |

3B. Provide Secondary ILL & “Back-up” Reference

Recommendations & Next Steps

Background / Assumptions

- **Secondary ILL** - Some Wisconsin public libraries use WISCAT for ILL; others use OCLC. System and / or Resource Library staff may or may not be involved directly in the process. At the individual library level, ILL service is provided by a wide range of staff with varying levels of training and ability.
- **Back-up Reference** - As mandated by State Statute, each regional public library system in Wisconsin has a Resource Library that must provide back-up reference.
 3. Develop bid requirements
 4. Determine timeline

3. Back-up Reference

- Change state mandate 43.16 to: Each public library system may have resource libraries under contract for mutually agreed upon services. A library system may contract with any library in the state capable of providing the services needed.
- Eliminate the state mandate 43.24(2)(b) that each system provides a back-up reference service, ILL, etc

Recommendations

1. Secondary ILL - Establish a centralized and integrated ILL service statewide. Evaluate WisCat and OCLC. Create new model or study existing models to obtain materials outside local ILS (secondary ILL) for all library types.
2. Appoint a state ILL committee to explore a centralized and integrated secondary ILL service. (Q4 2014)
 1. Research other state ILL Services
 2. Survey systems for additional information

3C. Physical Delivery

| Services Library Systems Deliver | Key Stakeholder | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|---|--|---|---|---|
| Facilitate Resource Sharing: 3C. Physical Delivery Physical Delivery Statewide | <ul style="list-style-type: none"> System Directors DPI All non-PL delivery network participants SCLS Delivery Private Couriers | <ul style="list-style-type: none"> Majority of public library systems, private academic universities, technical colleges, state agency libraries and UW-System libraries are provided service by SCLS through their single service hub in Madison. Some volume is transported directly between some northern public library systems via Walto. Identified Inefficiencies: <ul style="list-style-type: none"> Duplicated miles and stops, Significant additional mileage and time for some transfers Change Risks: <ul style="list-style-type: none"> Loss of quality control A day of transit time, in some instances, may be added between some locations. | <ul style="list-style-type: none"> \$1,400,000 (2013 5-Day) Potential Savings: <ul style="list-style-type: none"> \$250,000 to \$500,000 | <ul style="list-style-type: none"> A multi-hub statewide network could be developed. Regional hubs, likely making use of existing current public library system hubs located in major transportation corridors, would be the service centers for all the libraries participating in the statewide network in their regions. Ideally, the model evolves to where one regional hub ships totes directly to each of the other regional hubs and there is no longer a central hub. |
| Physical Delivery Local | <ul style="list-style-type: none"> System Directors and Staff, Member Libraries, Multi-type Libraries, Patrons, Service providers: In house and contracted | <ul style="list-style-type: none"> Delivery service within system borders is provided by each system independently. This can range from a one or two county system serving less than 10 libraries with low to manageable volume to larger multi-county systems service more than 50 members with high volume. Some are operated by the system and some make use of private couriers. Volume handled locally is generated via a system's ILS. | <ul style="list-style-type: none"> \$2,500,000 (2013) Potential Savings: <ul style="list-style-type: none"> Difficult to predict, but a 10% reduction seems feasible. | <ul style="list-style-type: none"> Develop a new statewide model and then develop local system delivery based upon a new state model. Delivery for systems within a regional statewide hub could consolidate to have all delivery in that region served by the statewide regional hub. |

3C. Physical Delivery

| Wisconsin State Library System 3C. Coordinate & Provide Physical Delivery | | | | | | | | |
|---|--------------------|---|---|--------------------|--------------------|------------------|------------------|--------------------|
| 1. System Name | State Aid | System Aid, Carryover and Interest Earned | Other State and Federal Library Program Funds | All Other Income | Total | State | Other State | System |
| Arrowhead Library System | \$60,892 | | | \$6,868 | \$67,760 | \$13,402 | | \$54,358 |
| Eastern Shores Library System | \$46,921 | | | \$29,516 | \$76,437 | \$13,654 | | \$62,783 |
| Indianhead Federated Library System | \$267,575 | | | | \$267,575 | \$16,183 | | \$251,392 |
| Kenosha County Library System | \$10,902 | | | | \$10,902 | \$10,902 | | \$0 |
| Lakeshores Library System | \$101,607 | | | \$23,493 | \$125,100 | \$12,564 | | \$112,536 |
| Manitowoc-Calumet Library System | \$44,000 | | | | \$44,000 | \$11,630 | | \$32,370 |
| Mid-Wisconsin Federated Library System | \$228,455 | | | \$5,020 | \$233,475 | \$15,084 | | \$218,391 |
| Milwaukee County Federated Library System | \$316,283 | | | | \$316,283 | \$19,739 | | \$296,544 |
| Nicolet Federated Library System | \$186,459 | | | | \$186,459 | \$13,887 | | \$172,572 |
| Northern Waters Library Service | \$49,776 | | \$15,000 | \$57,713 | \$122,489 | \$12,819 | | \$109,670 |
| Outagamie Waupaca Library System | \$89,443 | | | \$30,370 | \$119,813 | \$11,538 | | \$108,275 |
| South Central Library System | \$388,763 | | \$75,000 | \$1,554,103 | \$2,017,866 | \$21,175 | \$995,799 | \$1,000,892 |
| Southwest Wisconsin Library System | \$80,489 | | | \$4,669 | \$85,158 | \$12,864 | | \$72,294 |
| Waukesha County Federated Library System | \$129,416 | | | \$53,240 | \$182,656 | \$15,572 | | \$167,084 |
| Winding Rivers Library System | \$62,568 | | | \$97,546 | \$160,114 | \$16,440 | | \$143,674 |
| Winnefox Library System | \$32,332 | \$325 | | \$7,162 | \$39,819 | \$14,129 | | \$25,690 |
| Wisconsin Valley Library Service | \$156,711 | \$9,758 | | \$29,690 | \$196,159 | \$14,658 | | \$181,501 |
| Total | \$2,252,592 | \$10,083 | \$90,000 | \$1,899,390 | \$4,252,065 | \$246,237 | \$995,799 | \$3,010,029 |

3C. Physical Delivery

Exploration of Wisconsin Library Delivery Models Statewide

Background / Assumptions - Statewide

Majority of public library systems, private academic universities, technical colleges, state agency libraries and UW-System libraries are provided service by SCLS through their single service hub in Madison. Some volume, via a few northern public library systems, is transported directly between those northern public library systems via Waltco.

Identified Inefficiencies:

- Duplicated miles and stops
- Additional mileage due to single-hub dedicated delivery service model.

Change Risks:

- Loss of quality control
- Additional transit time.

Current Costs:

- Payments to SCLS and Waltco
 - In 2014, with 4-day service being the maximum standard, the cost has reduced to approximately \$1,317,000. Additional costs exist that are not able to be determined from other contracts for service between some northern systems and between SCLS & Minitex.

Potential savings of a multi-hub model:

- While a much more detailed model would need to be designed and priced, it is expected, conservatively, \$200,000 could be saved overall for the statewide service. The systems' share of this savings would be approximately on the low end of \$60,000

Recommendations:

1. Form a work group to develop alternative service model from a single-hub model to a regionally based multi-hub model.
2. Develop regional specifics for how service would be provided in multi-hub model and calculate estimated costs of new model.
3. Develop pilot to test new model starting with a northern regional hub because of the existing delivery links across the northern systems.
4. Revise 43.24(2)(fm) Statutory language: *physical delivery must be provided regionally and systems must participate in the statewide delivery network.*
5. Funding: Re-think 13% funding for systems and determine specific areas that DPI must fund such as the systems' share of statewide delivery system.
6. Funding: As part of all work groups formed from the work of the system study group, provide funding to assist with project management to coordinate and lead the work of the delivery work group.

3C. Physical Delivery

Exploration of Wisconsin Library Delivery Models

Local Public Library System Delivery

Current Models

Delivery service within system borders is provided by each system independently. This can range from a one or two county system serving less than 10 libraries with low to manageable volume to larger multi-county systems serving more than 50 members with high volume. Some are operated by the system and some make use of private couriers. Volume handled locally is generated via a patron's request using a system's ILS.

Identified Inefficiencies:

- Dedicated service without maximizing capacity
- Duplication of management and overhead

Change Risks:

- Delivery is ILS dependent.

Current Costs:

- Based upon reported delivery expenditures from the systems' 2013 annual reports, systems expend, very conservatively, \$2,935,000 million on local system delivery. To determine actual expenditures, more cost evaluation would need to be done.
- This is very difficult to estimate. However, just a 10% savings would result in another \$300,000 in savings. This amount is equal to more than the share the public library systems pay into statewide delivery, including LSTA funding.

Recommendations:

- Develop a new statewide model first and then develop local system delivery based upon a new state model.
- Local system delivery could be consolidated around the newly formed state hubs. This should be done on a region by region basis.

4. Coordinate Electronic Resources

| Services Library Systems Deliver | Key Stakeholders | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|--|--|---|--|--|
| <p>Facilitate Resource Sharing:</p> <p>4. Coordinate Electronic Resources</p> <p>Digital collections</p> | <ul style="list-style-type: none"> Local Library Staff Library Systems RL&LL Staff Patrons WILS | <ul style="list-style-type: none"> WPLC & WI Digital Library (would this also include digitization of local materials as well?) | <ul style="list-style-type: none"> 2013 total costs from LSTA funds for WI Digital Library=\$200,000 2013 total costs from individual library funds for WI Digital Library=\$800,000 | <ul style="list-style-type: none"> Continue & Expand the Coordination, Purchasing, Contracting & Management of electronic resources |
| <p>Databases</p> | <ul style="list-style-type: none"> - All State Residents - Local Library Staff - Resource Libraries - Library Systems - RL&LL Staff - WILS | <ul style="list-style-type: none"> Statewide through DPI (BadgerLink); 2013 the number of databases provided = 44 statewide Systems provided 1559 databases as a statewide total to member libraries Individual Libraries in 2013 reported providing 1,102 databases locally | <ul style="list-style-type: none"> 2013 total costs from individual public libraries for electronic resources =\$1,291,357 2014 cost for BadgerLink from state funds=\$2.44 million Not always a system-level expense - costs are sometimes included in system resource library contracts | <ul style="list-style-type: none"> Selection of databases based upon vetted criteria - also across all types of libraries |

4. Coordinate Electronic Resources

| 1. System Name | E-Books | E-audio materials | a. Uses of E-Books By Users of Your System | b. Uses of E-Audio by Users of Your Library |
|---|----------------|-------------------|--|---|
| Arrowhead Library System | 53,364 | 9,650 | 24,337 | 11,594 |
| Eastern Shores Library System | 65,173 | 9,650 | 41,153 | 11,323 |
| Indianhead Federated Library System | 54,884 | 13,679 | 51 | 82 |
| Kenosha County Library System | 0 | 0 | 0 | 0 |
| Lakeshores Library System | 53,620 | 9,650 | 26,661 | 12,329 |
| Manitowoc-Calumet Library System | 0 | 0 | 13,419 | 4,406 |
| Mid-Wisconsin Federated Library System | 19,178 | 9,653 | 39,648 | 15,468 |
| Milwaukee County Federated Library System | 0 | 0 | 0 | 0 |
| Nicolet Federated Library System | 55,176 | 13,573 | 0 | 0 |
| Northern Waters Library Service | 54,323 | 7,650 | 220 | 209 |
| Outagamie Waupaca Library System | 55,716 | 13,573 | 37,917 | 15,764 |
| South Central Library System | 53,364 | 9,650 | 149,536 | 74,264 |
| Southwest Wisconsin Library System | 53,633 | 16,197 | 17,719 | 9,096 |
| Waukesha County Federated Library System | 29,093 | 9,651 | 79,092 | 32,377 |
| Winding Rivers Library System | 19,096 | 9,650 | 30,890 | 17,293 |
| Winnefox Library System | 55,244 | 16,472 | 63,283 | 25,979 |
| Wisconsin Valley Library Service | 53,364 | 9,650 | 38,985 | 18,475 |
| Total | 675,228 | 158,348 | 562,911 | 248,659 |

4. Coordinate Electronic Resources

Recommendations & Next Steps

Background / Assumptions

- **Digital Collections:** WI Digital Library provides statewide access to downloadable audio, video and e-books. Funding is provided by systems and/or individual libraries and LSTA funding.
- Electronic resources are selected, purchased and provided in a variety of levels across the state, from the state funding and coordination of Badgerlink to individual libraries providing resources for their communities.
- Badgerlink is a successful state-funded collection of online resources and databases used heavily by school and public libraries. This could serve as a model for future collaboration across the state.
- WiLS serves as a resource for collaborative purchasing for all types of libraries.
- Databases are purchased in all library types, including academic, school and public libraries. This is done with little collaboration between libraries and leads to a duplication of services and efforts.

Recommendations

1. Continue to support access to the WI Digital Library on a system and individual library level. Continue to provide State matching funds to encourage development of the collection
2. Continue and expand the coordination, purchasing, contracting and management of electronic resources, either using the Badgerlink or WiLS model.
3. Selection of databases should be based upon vetted criteria.
4. All types of libraries should collaborate on purchase and access to electronic resources.

5. Form Electronic Resources Team to establish criteria for electronic resource acquisition among Wisconsin libraries.

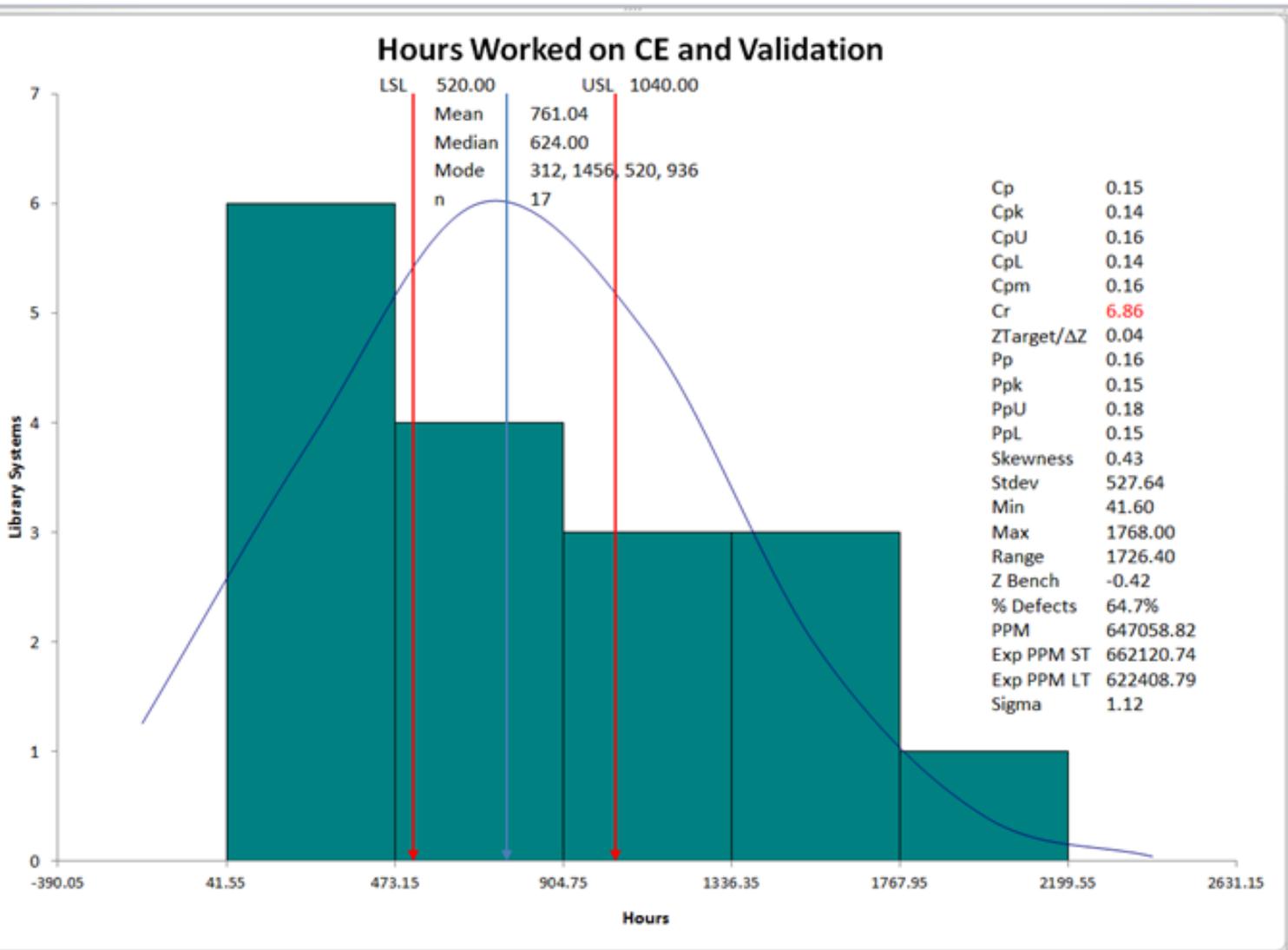
5. Coordinate & Provide Continuing Education

| Services Library Systems Deliver | Key Stakeholder | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|---|---|--|--|---|
| <p>5. Coordinate & Provide Continuing Education</p> <ul style="list-style-type: none"> Coordinate training for library personnel and trustees Validate Content for Director Certification (100 hours required every 5 years) | <ul style="list-style-type: none"> Current System Staff who provide CE and Validation Member Library Directors Member Library staff DPI Legislature (state mandated Ch. 43 for systems to provide) | <ul style="list-style-type: none"> Library Systems have someone in charge of providing state mandated Director Training. They also provide training to other member (and non-member) library staff in person, via webinar, or by booking an expert to train in person or via webinar. Someone at the system level validates the director training as other CE opportunities exist outside of the system offerings at conferences (WLA ALA PLA), UW Library School, other academic credits. Then the system reports the validation to DPI for Director Certification. Note: While systems are mandated to provide director training, libraries are not mandated to attend. Other training is out there and many times, more effective for the mid-size and large libraries. | <ul style="list-style-type: none"> System Staff salaries=\$918,000. Actual cost of providing Training by Systems = \$480,138 (includes % of the persons' salary designated for CE tasks plus CE budgets per system.) Cost is likely higher as some systems have directors spending some of their time validating. Range of \$3,900 to \$89,400. Time cost is 12,938 hours spent on CE/Training/Validation. Number of total trainings= 325 annually with a range of 6-63. Attendance at trainings averages 26 statewide with a range of 0-150 | <ul style="list-style-type: none"> Regionally based providers. Statewide coordination of one or two statewide providers. One Validator or a validation team statewide with as few as 2 people, provide a pool of funds for directors to utilize on their own with the validator controlling the release of funds. Validate on the front end and then the back end for attendance. Utilize technology (mixed reviews in VOC: Not as effective as in person, also small libraries don't have the staff to get away from the library to attend in person or webinar trainings) Budget funds for sub-librarians to fill in at small libraries so they can attend |

5. Coordinate & Provide Continuing Education

| Wisconsin State Library System 5. Coordinate & Provide Continuing Education | | | | | | | | | |
|---|------------------|-------------------------------|-----------------|------------------|------------------------------|------------------|--------------------|------------|-----------------------------------|
| 1. System Name | CE Budget | # of Library locations served | % of work on CE | Salary | # of CE & Trainings annually | Total \$ | Hours Worked on CE | Attendance | Aver Attendance from high and low |
| Arrowhead Library System | \$1,000 | 7 | 15% | \$56,000 | 11 | \$11,920 | 312 | 0-20 | 10 |
| Eastern Shores Library System | \$3,350 | 13 | 20% | \$50,000 | 15 | \$16,350 | 416 | 4-35 | 19.5 |
| Indianhead Federated Library System | \$6,000 | 53 | 30% | \$45,000 | 45 | \$23,550 | 624 | | |
| Kenosha County Library System | \$18,000 | 4 | 40% | \$54,000 | 20 | \$46,080 | 832 | 6-25 | 15.5 |
| Lakeshores Library System | \$3,124 | 15 | 15% | \$70,000 | 6 | \$16,774 | 312 | 3-25 | 14 |
| Manitowoc-Calumet Library System | \$1,000 | 6 | 5% | \$58,000 | 6 | \$4,770 | 104 | 6-20 | 13 |
| Mid-Wisconsin Federated Library System | \$5,000 | 27 | 55% | \$46,000 | 13 | \$37,890 | 1144 | 5-100 | 52.5 |
| Milwaukee County Federated Library System | \$5,774 | 27 | 2% | \$67,000 | 8 | \$7,516 | 41.6 | 6-25 | 15.5 |
| Nicolet Federated Library System | \$7,000 | 42 | 70% | \$48,000 | 35 | \$50,680 | 1456 | 10-150 | 80 |
| Northern Waters Library Service | \$7,500 | 30 | 25% | \$53,000 | 20 | \$24,725 | 520 | | |
| Outagamie Waupaca Library System | \$14,000 | 17 | 65% | \$49,000 | 15 | \$55,405 | 1352 | 13-74 | 43.5 |
| South Central Library System | \$35,000 | 64 | 85% | \$64,000 | 63 | \$105,720 | 1768 | 3-77 | 40 |
| Southwest Wisconsin Library System | \$4,800 | 30 | 10% | \$62,000 | 15 | \$12,860 | 208 | 3-21 | 12 |
| Waukesha County Federated Library System | \$4,400 | 16 | 45% | \$67,000 | 23 | \$43,595 | 936 | 3-105 | 54 |
| Winding Rivers Library System | \$2,000 | 42 | 70% | \$58,000 | 8 | \$54,780 | 1456 | 20-36 | 28 |
| Winnefox Library System | \$3,250 | 32 | 45% | \$58,000 | 12 | \$37,180 | 936 | 15-40 | 27.5 |
| Wisconsin Valley Library Service | \$26,000 | 34 | 25% | \$13,000 | 10 | \$30,225 | 520 | 5-40 | 22.5 |
| Total | \$147,198 | 459 | 37% | \$918,000 | 325 | \$580,020 | 12,938 | | 26 |
| Mandated for systems to provide but not mandated for libraries to attend. | | | | | | | 6.5 | FTE's | |

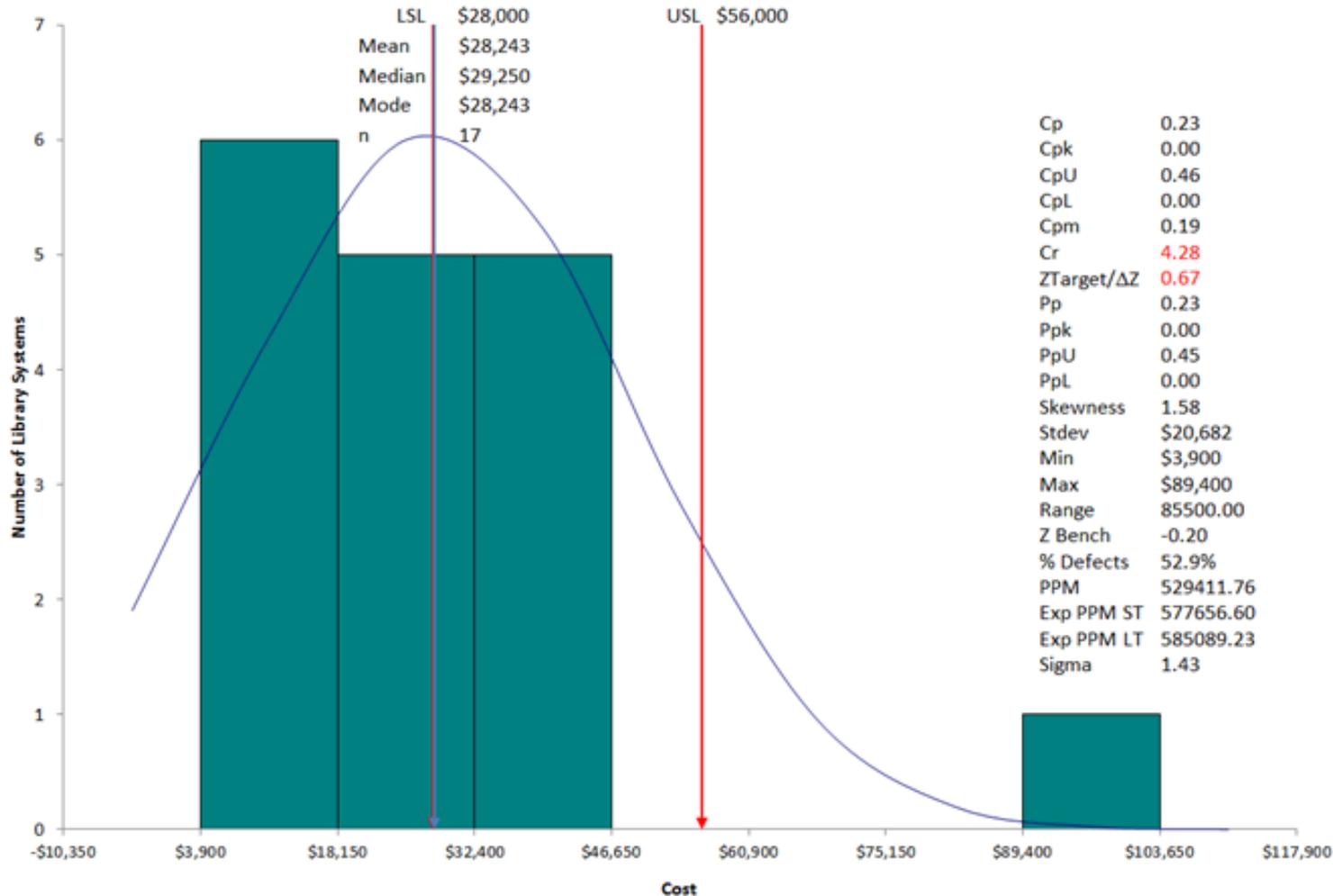
5. Coordinate & Provide Continuing Education



The Low Spec Limit (LSL) and High Spec Limit (HSL) are added by me. If it's state mandated, someone in each system probably should be working at least 25% to 50% of a full-time. We can set these specs where we think they should be. If we assume these are accurate, this process needs to reduce variation, provide consistency, & improving weak performances.

5. Coordinate & Provide Continuing Education

Amount of \$ Spent on CE/Training/Validation including Salaries



The LSL and HSL are my own, but if assumed accurate, the poor performing systems need to improve and variation needs to be reduced, but the outlier needs to be investigated. Why are they spending so much. It's NOT because they contract out with other systems. An entirely new way to provide this service is an option as well.

5. Coordinate & Provide Continuing Education

Recommendations & Next Steps

Background / Assumptions

- Currently systems are required to provide continuing education opportunities to their member libraries' staffs, but no specifics regarding quantity or quality of continuing education are mandated. The statutory language states: 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid the system must provided "(e) In-service training for participating public library personnel and trustees."
- Aside from the library director certification requirements, there are no standards that define what is considered in-service continuing education and what are library system tactical operational trainings for library member staff like ILS training, delivery process, and system participation requirements.
- All 17 systems provide varying degrees of continuing education services.
- The annual cost to deliver continuing education statewide through library systems is approximately \$520,000.
- A range among systems of ability and investment exists with a low of 0.15 FTE spending \$3,900 to a high of 0.85 FTE spending \$89,400, and only 6 systems representing the average of 0.4 FTE spending \$29,000.
- An equivalent of 6 FTEs (13,000 hours) are spent annually on CE, but it's generously estimated that only 2,600 hours of continuing education provision (classes, workshops, webinars, etc.) is being provided.
- Some systems are contracting with other systems to provide the bulk of the continuing education they provide. Other systems work in tandem or collaborate. A culture of collaboration regionally already exists, but it could be formally improved to reduce unplanned overlapping efforts and redundancies.

5. Coordinate & Provide Continuing Education

Recommendations & Next Steps

Recommendations

1. Remove continuing education from required system provided services for State Aid funding. Eliminate 43.24(2)(e). Legislation changes would be needed to allow DPI to retain or segment State Aid to distribute to designated systems, library organizations or independent contractors to provide regional and collaborative statewide continuing education under Administrative Rules.
2. This service would be placed under DPI supervision. The equivalent of six FTEs currently doing the job in library systems should be reduced to be coordinated on larger regional levels in the state.
3. DPI would choose which systems, library organizations or independent contractors to contract for continuing education services, and determine the scope or direction, the qualifying required elements, and standards of continuing education offerings, as well as the evaluation of outside offerings for director certification.
4. Any fiscal efficiencies gained should be redirected to other service priorities at library systems that libraries need like Technology/IT support and infrastructure, ILS, or Delivery Services.
5. COLAND requests drafting of legislation for continuing education service area establishment.
6. DPI drafts administrative rules to define continuing education regions, delivery methods, standards for library staff and trustees, scope of CE, etc.
7. Convene meetings of system and public library staff
 - Demonstrate existing shared projects
 - Facilitate discussion for potential shared CE projects to promote development of regional/statewide standardization
8. Provide capital seed money for lean continuing education projects
9. Create regional model in one area of the state as a trial to learn best practices to carry forward in new biennium budget when the four regions are created.
 - Provide fiscal support to attend meetings

6. Manage System Administration Funding & Overhead

| Services Library Systems Deliver | Key Stakeholder | Current Way Service is Delivered | Current Cost | Recommendation / Best Way |
|--|--|----------------------------------|---|---|
| <p>6. Manage System Administration Funding & Overhead</p> <ul style="list-style-type: none"> . Manage System Board . Fiscal . Personnel . Planning <p>Managing Overhead</p> <ul style="list-style-type: none"> . Manage facilities (contacts, repairs, snowplowing, etc) . Equipment | <ul style="list-style-type: none"> •DPI •System Directors •Library Directors •Library Boards <hr/> <p>Overhead</p> <ul style="list-style-type: none"> •commercial vendor or other – landlord •Library & system staff | | <ul style="list-style-type: none"> •Staff •Equipment •Supplies •Travel •Facility upkeep •Space •Services | <p>Fewer:</p> <ul style="list-style-type: none"> • Systems (new name) • Administrators • Support staff • Boards and meetings • Reports • People on systems boards <p>More:</p> <ul style="list-style-type: none"> • Incentives to consolidate for staff <hr/> <p>Overhead:</p> <ul style="list-style-type: none"> • Less buildings: officeless services • Less hardware • Less accounting, payroll, audits • standardized accounting |

6. Manage System Administration Funding & Overhead

| Wisconsin State Library System 6. Manage System Administration Funding & Overhead | | | | | | | | | | | |
|---|---------------------|------------------------------|-----------------------------------|------------------------|----------------------|--------------------|------------------------------|-------------------------------------|--------------------------|----------------------|----------------------|
| 1. System Name | Total System Aid | Total Carryover and Interest | Total Other state & federal funds | Total All Other Income | Total Program Budget | Admin - System Aid | Admin - Carryover & Interest | Admin - Other state & federal funds | Admin - All Other Income | Administrative Total | Admin % of State Aid |
| Arrowhead Library System | \$438,605 | \$2,160 | | \$1,223,939 | \$1,664,704 | \$17,417 | | | \$1,500 | \$18,917 | 3.95% |
| Eastern Shores Library System | \$578,545 | \$13,862 | \$17,584 | \$1,977,748 | \$2,587,739 | \$95,199 | | | | \$95,199 | 16.07% |
| Indianhead Federated Library System | \$1,125,114 | \$58,181 | \$64,629 | \$728,594 | \$1,976,518 | \$127,879 | \$58,181 | | \$1,700 | \$187,760 | 15.72% |
| Kenosha County Library System | \$398,675 | | | \$1,485,444 | \$1,884,119 | \$500 | | | | \$500 | 0.13% |
| Lakeshores Library System | \$637,716 | \$2,000 | | \$4,160,354 | \$4,800,070 | \$110,180 | | | | \$110,180 | 17.22% |
| Manitowoc-Calumet Library System | \$312,113 | \$14,184 | | \$2,035,961 | \$2,362,258 | \$62,000 | | | | \$62,000 | 19.00% |
| Mid-Wisconsin Federated Library System | \$754,421 | \$523,424 | \$17,500 | \$298,651 | \$1,593,996 | \$90,843 | | | | \$90,843 | 7.11% |
| Milwaukee County Federated Library System | \$2,677,006 | \$1,000 | \$63,773 | \$1,382,249 | \$4,124,028 | \$344,017 | | | | \$344,017 | 12.85% |
| Nicolet Federated Library System | \$1,069,413 | \$124,797 | \$42,583 | \$444,343 | \$1,681,136 | \$107,080 | \$52,300 | | | \$159,380 | 13.35% |
| Northern Waters Library Service | \$529,104 | | \$44,927 | \$380,254 | \$954,285 | \$60,652 | | | | \$60,652 | 11.46% |
| Outagamie Waupaca Library System | \$607,514 | \$1,500 | \$22,513 | \$3,854,787 | \$4,486,314 | \$53,977 | \$1,500 | | \$74,500 | \$129,977 | 9.11% |
| South Central Library System | \$2,057,367 | | \$151,243 | \$6,710,732 | \$8,919,342 | \$233,184 | | | \$54,651 | \$287,835 | 11.33% |
| Southwest Wisconsin Library System | \$363,341 | \$199,734 | \$14,100 | \$178,307 | \$755,482 | \$40,901 | | | \$1,678 | \$42,579 | 7.26% |
| Waukesha County Federated Library System | \$958,636 | | \$33,196 | \$3,730,890 | \$4,722,722 | \$135,030 | | | \$30,839 | \$165,869 | 14.09% |
| Winding Rivers Library System | \$767,701 | \$1,700 | \$22,600 | \$168,823 | \$960,824 | \$98,573 | | | \$12,273 | \$110,846 | 12.81% |
| Winnefox Library System | \$885,885 | \$15,749 | \$19,100 | \$946,393 | \$1,867,127 | \$171,714 | \$2,076 | | \$71,410 | \$245,200 | 19.28% |
| Wisconsin Valley Library Service | \$851,944 | \$43,000 | \$54,081 | \$493,739 | \$1,442,764 | \$111,691 | \$7,500 | | \$35,762 | \$154,953 | 13.32% |
| Total | \$15,013,100 | \$1,001,291 | \$567,829 | \$30,201,208 | \$46,783,428 | \$1,860,837 | \$121,557 | \$0 | \$284,313 | \$2,266,707 | 12.00% |

6. Manage System Administration Funding & Overhead

Recommendations & Next Steps

Background / Assumptions

- Systems are allowed to spend up to 20% of total system aid.

Recommendations

1. Standardize system accounting definitions and accounting practices
2. Change name from “system” to “Coordinated Public Library Service Regions”
3. Governance
 - Streamline system administration and governance since current system boards are too big
 - Eliminate Resource Board Member requirement
 - Require member library advisory committee representative report to the system board
4. Incentivize Consolidation / Analysis
5. Eliminated option for single consolidated county system.
6. After completion of service redesign work groups, a group is formed to consider reorganizations and/or consolidation of systems. In conjunction, a committee is established to do a full review of Chapter 43, administrative code and system and library funding. This review should also include consideration of reducing size of system boards.
7. Systems must employ a full-time certified director. 43.17 (4) Change from “appointed” to “employed”.

Risks and Issues

1. Lots of recommendations, not a lot of execution
2. No clear “owners” for core processes
3. No “teeth” or incentive for systems to change

1. COLAND Work Group

1. Complete recommendations, including any legislative requests.
2. Work with DLT to identify funds for project management and contract with project manager.
3. Populate service work groups.
4. Finalize and prioritize project process and timelines for service work groups.
5. Develop communication plan.

2. Form implementation teams for services

1. Finalize service model recommendations.
2. Test recommendations with pilots.
3. Develop and execute implementation plans for recommendations.