

W I S C O N S I N



PLSR

PUBLIC LIBRARY SYSTEM
REDESIGN PROJECT

Chapter 43 Workgroup Report

April 2, 2018

This report is part of a larger report presented to the
PLSR Steering Committee:

<http://www.plsr.info/april2018report>

Chapter 43 Workgroup

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PROJECT MANAGER INTRODUCTION

The report of the Chapter 43 Workgroup is part of a culmination of a larger process to consider how to best provide public library system services in Wisconsin. Building on the work of many, its goal is to develop a plan for implementation of new models of service. The process, led by a Steering Committee, will result in recommendations from the Steering Committee to the Department of Public Instruction (DPI). The workgroup reports are provided to the Steering Committee as an input to their recommendation process.

In order to develop new models of service, the project manager formed workgroups of community members. The PLSR Steering Committee, with the guidance of the project manager, selected workgroup leads and facilitators from a pool of applicants for each service area and assigned liaisons from DPI and the Steering Committee to each group. In March 2016, the facilitators, leads and liaisons to each workgroup reviewed the applications from potential participants to determine the composition of the workgroups.

The following report is the result of the workgroup's research for their topic area over the past two years.

THE REPORTS ARE NOT THE END OF THE PROCESS

While these reports are an important step in the process, they are far from the end. The Steering Committee will work with Core Recommendation Collaborators, Model Development Summit Participants and a facilitator to build their recommendations for DPI. In addition to the workgroup recommendations, many other sources of information will be considered during the Steering Committee's recommendation development process. After the Steering Committee submits their recommendations to DPI, there are a number of steps and processes that DPI may undertake to further vet the recommendations with the library community and others.

For more information about the process and reports, please see the complete Project Manager's Report, linked from <http://www.plsr.info/workgroups/workgroupreport/>

WORKGROUP MEMBERS

Walter Burkhalter, Fontana Public Library (Lead)
Marla Sepnafski, Wisconsin Valley Library Service (Facilitator)
Nan Champe, South Milwaukee Public Library
David Kranz, La Crosse Public Library
Connie Meyer, Bridges Library System
Greg Mickells, Madison Public Library
Virginia Roberts, Rhinelander District Library

Steering Committee Liaisons

Paula Kiely, Milwaukee Public Library
John Thompson, Indianhead Federated Library System

DPI Liaison

John DeBacher

CHARGE OF WORKGROUP

Initially, this workgroup was charged with reviewing Chapter 43, the Wisconsin State law that provides funding for coordinated regional library services, in order to make recommendations for changes in conjunction with other workgroup recommendations.

Statutes related to library systems include Standards 43.15 Governance 43.17; 43.19 System Funding 43.24 Administration 43.15; 43.17 Services to Libraries 43.24 (2) System territory 43.15, 43.18 and were thus the focus of the Chapter 43 workgroup. Though critical to equitable library service, the County Funding (ACT 150/420), standards for libraries and director certification fall outside of the charge to the Steering Committee and are regional in nature and not statewide and were therefore not part of this workgroup's efforts.

The PLSR process was designed to be flexible and adaptive. The role of the Chapter 43 workgroup, in tandem with the Steering Committee's process, has adapted to changing needs from the community. Initially, the process imagined that governance, funding and administrative recommendations would be developed as the service workgroups developed their models and recommendations. In this process, the Chapter 43 workgroup would have provided concrete legislative recommendations in this report. However, issues with timing and feedback from the wider public library community resulted in the Steering Committee deciding to wait for the service workgroup reports before making recommendations related to structure.

The premise of the PLSR process was that it should be service-driven and that workgroups should develop their models without restrictions. With the guidance of DPI, more time was introduced into the process for Steering to develop their recommendations. In order to involve more members of the community and to bring in more expertise and knowledge, Core Recommendation Collaborators and Model Development Summit participants were introduced into the process.

Due to these changes, the Steering Committee determined that rather than expecting a report from this workgroup detailing specific recommendations related to Chapter 43, the workgroup should remain active through the end of the Steering Committee's recommendation development process. During this time, the Steering Committee will continue to rely on the workgroup for research, though much has already been completed during the workgroup recommendations development phase.

From April through August 2018, as the Steering Committee goes through its recommendation development process with Core Recommendation Collaborators from the community, this group will move into a direct legislative advisement role to the Steering Committee and their work will fall under the direction of the Steering Committee. Due to these changes, this group will become an official subcommittee of the Steering Committee to formalize their role.

The workgroup determined that any changes made to Chapter 43 related to library services supported through state funding should:

- Encourage flexibility
- Allow for change/innovation
- Remove barriers to equity
- Promote equity of service to libraries
- Support equity of library service statewide

These outcomes will help frame the work of the Steering Committee as they begin to develop their own recommendations.

BACKGROUND

Wisconsin's library system law, which provides funding for coordinated regional library services, officially went into effect in 1971 when Senate Bill 47 was signed into law (1971 Act 152). The creation of public library systems fostered the establishment of a strong network of resource sharing and mutually beneficial interdependence. The actual creation and development of public library systems in Wisconsin was a voluntary and gradual process. No county or public

library is required to be a member of a library system; yet, as of this writing, all of Wisconsin's 72 counties and more than 380 public libraries are library system members. Wisconsin's 16 public library systems developed in distinct ways in response to the needs of their member libraries and area residents.

Currently, library systems must provide the following in order to receive state aid:

- Technology and resource sharing planning
- Referral or routing of reference and interlibrary loan requests
- Electronic delivery of information and physical delivery of library materials
- Training for member library staff and trustees
- Professional consultant services
- Support for library service to users with special needs
- Backup reference, information, and interlibrary loan services from the system resource library
- Planning with other types of libraries in the system area
- Service agreements with all adjacent library systems
- Agreements with each member library that require those libraries to serve all residents of the system area on the same basis as local residents

Individual library system plans address how these services are provided to libraries. As the systems evolved, the levels of service provided to meet these requirements have varied. Services such as regional integrated library systems (ILS) and technology support grew out of the needs of member libraries but are not specifically addressed as mandated system services.

While changes in society, resources and technologies have created new demands and opportunities for systems, the law and services required of them as well as many of their practices are still relatively unchanged from the original law. The library community—the systems, libraries, and the legislature—has recognized the need to update what is required of library systems as well as to redesign the services in a manner that is more efficient and effective.

RESEARCH PROCESS

Because the Chapter 43 workgroup is at least in part dependent upon the findings of the service workgroups and the administrative decision-making of the Steering Committee, much of the work has been research of the current Wisconsin state law and statutes pertaining to collaborative library services in other states. The group met four times, with the first meeting

taking place on June 7th, 2016 and the last on March 7, 2018.

Workgroup members contacted several states with a common list of questions in order to learn how other states have organized themselves to provide regional and statewide services. The workgroup also gathered the following data and information, some in the form of past reports and others as new sources:

- Conversation with Steve Conway, WLA lobbyist
- Conversation with Paul Farrow, Waukesha County Executive
- *A Plan for a Wisconsin Library and Information Network: Knowledge Network of Wisconsin*, by Joseph Becker and Robert M. Hayes for the DPI Division for Library Services (October 1970)
- Reference and Loan Library: 1979-81 Budget Proposal
- Wisconsin Library Network Plan Report: Recommendations for Network Development at the Area Level (December 1981)
- COLAND report on *Regional Organizations for Interlibrary Cooperation and Resource Sharing: The Development of Multitype Library Systems in Wisconsin* (December 1982)
- *Multitype Library Cooperation at the Area/System Level in Wisconsin*, a report by COLAND to the State Superintendent of Public Instruction (August 1988)
- Bill Analysis, Bill No. 1989 AB 730, Date of Introduction Dec. 1, 1989 (prepared Dec. 18, 1989)
- *Some Thoughts About Wisconsin Public Library Systems*, by Rick Krumwiede (Feb.18, 2000)
- SRLAAW Retreat Discussion Paper: Developing a Unifying Vision for Library Services in Wisconsin (Undated, though it followed from a March 2-3, 2000, planning retreat in Wausau and encouraged regional discussions to be completed by end of July 2000)
- South Central Library System SRLAAW discussion materials (June 16, 2000)
- *Wisconsin Public Library System Size and Organization*, by Jane Pearlmutter, Louise Robbins and Anna Palmer (January 2005)
- Peter Hamon, retired South Central Library System director, was also contracted as a Chapter 43 expert and provided commentary related to various sections of the law for the workgroup's consideration.

OTHER STATE RESEARCH FINDINGS

As examples of initial insights into other states the workgroup discovered in their initial research, workgroup members shared general overview information regarding the following four states at a presentation at the 2017 Wisconsin Libraries Association Conference.

MINNESOTA

Minnesota has two types of systems: a set of 12 regional systems cover the state that provide basic library services including facilitating communication among participants, resource sharing, delivery of materials, reciprocal borrowing and cooperative reference service. Most of these regional systems provide a shared catalog, purchase some materials and provide some training/professional development.

Separately, a set of seven multi-county, multi-type systems also cover the state that provide services such as referral of users, intrasystem reciprocal borrowing, cooperative collection development, cooperative reference services, staff development, research and development, cooperative storage facilities, publicity and community relations. The regional systems also work with Minitex, a collaborative program housed at University of Minnesota with funding from the State Library Service to provide the Electronic Library of Minnesota, ILL, delivery, continuing education, Minnesota Digital Library and cooperative purchasing. The State Library Services also operates the Minnesota Braille and Talking book library, administers grants, collections statistics, general consulting and provides statewide programs for youth services.

OHIO

Ohio has 251 public libraries, which are called public library systems, with 481 branch locations. The State Library of Ohio maximizes the use of public funds by facilitating resource and information sharing among Ohio's libraries through programs such as:

- The Serving Every Ohioan (SEO) Library Consortium [93 small and rural library systems at 225 physical locations across 46 counties all over Ohio using the Ohio Public Library Information Network (OPLIN)]
- Ohio Libraries Share: MORE (Moving Ohio Resources Everywhere) which connects almost 100 participating libraries using disparate types of catalog systems to make it possible for Ohio residents to borrow materials from libraries across the state.
- The Statewide Delivery System supports statewide resource sharing by delivering books and materials to Ohio library users.
- The Ohio Web Library makes a collection of thousands of digital publications and research materials available to all Ohio libraries, schools, universities, and residents at no cost.
- The Ohio Digital Library provides downloadable ebooks and other digital content to library customers.

A State Library Board governs the State Library of Ohio and appoints a State Librarian. Members of the five-member board are appointed by the State Board of Education and each serves a

five-year term of office. Ohio's four regional Library Systems are member-driven, multi-type library organizations that coordinate and facilitate the development of professional development events and other innovative services for Ohio academic, public, school and special libraries. They provide educational and technology training programs and workshops, coordinate regional library programs and deliver technology support and consulting services to member libraries and their staffs.

COLORADO

Colorado had seven systems until the passage of the Taxpayers Bill of Rights, which led to line item cut of funds for systems in 2002. Currently, the State Library, which falls under the Department of Education, has two main roles: to collect statistics from the libraries and administer a state grants program. It does also have roles related to access to publications and continuing education.

Funds supporting the State Library are 36% LSTA and 64% state tax support. Of the 64% from state funds, all but 18% is pass-through for grants to libraries or provided to Colorado Library Consortium (CLiC) for statewide services. CLiC emerged from the elimination of funding for the seven systems to provide centralized state services, including delivery, continuing education, regional consulting, ASPENCat union catalog ILS for over 100 libraries and statewide databases. There are multiple independent ILS networks in the state.

TEXAS

Texas saw a significant cut in state library funding for services in 2011. The agency took several actions as a result of these cuts: eliminated certain FTE positions, merged the two library-focused divisions to create the new Library Development and Networking Division, eliminated the Loan Star Libraries Grant Program of direct assistance to Texas public libraries and eliminated their ten regional library systems. The State Library is the only organization providing collaborative library services although the Texas Library Association provides some coordination with K12. The primary service supported by the State Library is Tech Share, which provides access to online resources and offers an ILL card that may also be used at all participating libraries. The State Library is an independent state agency, governed by a seven-member commission. The State Librarian administers the agency and is selected and appointed by the Commission.

Findings from other states include:

- Since 2000, a number of states have eliminated, curtailed or sharply reduced funding for regional services to public libraries
- Those with higher funding require services to all types of libraries

- No other states were identified as having “resource libraries” as required components of regional services to public libraries
- Few other states have as many regional service areas as Wisconsin, though some have overlapping regional support of different types
- Governing boards of systems in other states typically include representation of the libraries
- Some states (e.g. Kansas) have limited taxation powers of their own to supplement state funding
- Some regional structures in other states (Minnesota) have governance authority over member libraries

GOING FORWARD

There are three key points during this next phase when the Chapter 43 Subcommittee will review recommendation development milestones and provide the Steering Committee summary reports for the committee’s and Core Recommendation Collaborator’s consideration. These are:

- Service model recommendations report from the workgroups
- Preliminary framework of structure recommendations
- Model Summit Development outcomes

These reports will include examples of other models that exist from other states, drawing from what has already been done elsewhere along with analysis of Chapter 43 and legislative considerations related to the recommendations. The summary reports will cover questions such as:

- Is legislative change necessary and if so, what should change?
- What consequences, foreseen and potentially unintended, might there be from the changes?

The Chapter 43 Subcommittee’s role will be to advise and assist the Steering Committee regarding legislative considerations, but not to develop the administrative, funding and governance structure recommendations, which is the job of the Steering Committee and the Core Recommendation Collaborators.