



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

GENERAL INFORMATION

Library System

Lakeshores Library System

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

The 2020 Plan for Lakeshores Library System (LLS) incorporates a number of key needs. First, it is designed to support the statutory obligations of public library systems in Wisconsin by providing the required services at a high level of quality. It is also intended to provide LLS member libraries with additional services they want - also at a high level of quality. Lastly, the plan is designed to support partnerships with other regional library systems on initiatives of importance to the region and state.

There are a number of significant problems (challenges) that are reflected in this plan. First, a broad spectrum of member libraries - ranging from large/urban to very small/rural - requires differing approaches to service. Second, a relatively sparse population density across the LLS service area results in resource/funding scarcity with regard to the state aid formula. Third, an expansion of the LLS technology team in 2019 by +1 FTE (supported by contract income) creates a tighter budgeting scenario. Lastly, service delivery challenges within other public library systems have resulted in partnerships to share software, infrastructure, and provide IT services and administration for-a-fee.

Did the library system consult member libraries in the development of this plan?

- No, the library system did not include member libraries in the development of this plan.
- Yes, the library system included member libraries in the development of this plan.

If yes, describe the planning environment and process for this system plan. Include how member libraries are involved in plan development and review:

Member libraries were informed of the development of the plan, and were invited to comment in regard to priorities the system should take into consideration.

Does the library system have a formally appointed advisory committee under Wis. Stat. § 43.17(2m)?

- No, the library system does not have a formally appointed advisory committee.
- Yes, the library system has a formally appointed advisory committee.

If the system appoints an advisory committee under Wis. Stat. § 43.17(2m), describe how the system makes appointments, posts meetings, and how the advisory committee reports to the library system board. Include a list of any additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the Division:

The LAC (Librarian Advisory Committee) exists as a communication interface between the system and its member libraries. The LAC is outlined in the LLS bylaws. Each member library sends a representative. Meetings occur on the first Tuesday of each month (12 meetings per year). The LAC nominates and elects a chairperson on an annual basis, alternating by county. Meeting agendas and minutes are posted according to the Wisconsin open meetings law, and are archived on the LLS website. A member of the LLS board serves as a liaison between the LAC and system board, delivering updates at the meetings of each body in regard to the other body's activities.

ASSURANCES

ASSURANCES (cont'd)

The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year **2020**. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

Wis. Stat. § 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section it shall ensure that all of the following are provided:

Membership Agreements

- Wis. Stat. § 43.24(2)(a) Written agreements that comply with Wis. Stat. § 43.15(4)(c)4 with all member libraries.
- The system will provide a sample copy of the agreement with a list of all members signing and the dates signed to the Division by January 15. (The system does not need to file multiple copies of the same agreement; only a sample copy of each type of agreement is necessary.)

If the system is providing the sample copy and list of members signing through a publicly available webpage, provide the URL here:

<https://www2.lakeshores.lib.wi.us/reports-plans>

Resource Library Agreement

- Wis. Stat. § 43.24(2)(b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.
- The system will provide a signed copy of the resource library agreement to the Division by January 15.

If the system is providing the resource library agreement through a publicly available webpage, provide the URL here:

<https://www2.lakeshores.lib.wi.us/reports-plans>

Reference Referral, Interlibrary Loan, and Technology

- Wis. Stat. § 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

List ongoing activities related to this requirement:

LLS maintains an interlibrary loan clearinghouse, staffed by 1 FTE. This position also technically handles the reference routing portfolio, but in practice has not received any reference routing requests in years.

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

The ILL clearinghouse is a mature service staffed by an experienced FTE. As such, there are no significant changes expected in the coming year with respect to the clearinghouse. With the WISCAT ILL software slated for a significant upgrade this fall, it is expected that LLS may experience disruption with the integrated patron-initiated ILL features we have built-out over the last few years.

Inservice Training

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

The Division interprets inservice training to incorporate a range of in-person and virtual continuing education opportunities.

List ongoing activities related to this requirement.

LLS primarily contracts with other public library systems in order to provide quality continuing education opportunities to its member libraries. Ongoing activities include in-person events and webinar-type events. Event topics are chosen on an annual basis in response to the desires expressed by member libraries.

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

The activities for 2020 are expected to be on-par with last year with regard to the number and quality of events.

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

The LLS staffer who serves as CE coordinator and validator is Steve Ohs (sohs@lakeshores.lib.wi.us).

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

LLS partners with the following systems for access to CE events: Bridges Library System, South Central Library System, and Wisconsin Valley Library Service. Most agreements are informal.

ASSURANCES (cont'd)

Delivery and Communication

Wis. Stat. § 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

List ongoing activities related to this requirement. For physical delivery reference resources, personnel, and vendors.

LLS administers a wide area network (via Wiscnet), and email domains (via Gsuite) for each member library, facilitating electronic delivery of information. LLS facilitates physical materials transfer between its member libraries by means of a contract with a vendor (currently Excell Express Messenger). LLS also contracts for sorting hub services with VIP Services, Inc. (Elkhorn, WI). The VIP sorting hub also serves as a transfer point between the delivery networks of Kenosha County Library System and Arrowhead Library System, linking together all of the member libraries of the SHARE Consortium.

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

LLS is in the process of facilitating the procurement of a 24 bin automated materials handler by the Racine Public Library. LLS is providing a capital investment in the project to support upsizing of the machine in order to sort for the LLS member libraries and provide pre-sorting for KCLS and ALS system partners. Placement of an automated materials handler in Racine will require relocation of sorting hub activities from VIP services back to Racine. Taking the need to assist ALS in funding a delivery link between its headquarters in Milton and Racine Public Library into account, elimination of the VIP sorting contract will result in several thousand dollars of savings to LLS. It is hoped that this project, in conjunction with other RFID-related initiatives, will incentivize SHARE member libraries to expedite their transition to RFID tagging of collections.

Service Agreements

Wis. Stat. § 43.24(2)(g) Service agreements with all adjacent library systems.

The system will provide a copy of the agreements to the Division by January 15. The agreements with adjacent systems – including consulting agreements, consortium agreements, etc. – must include a list of all systems signing the agreement.

If the system is providing the service agreements through a publicly available webpage, provide the URL here:

<https://www2.lakeshores.lib.wi.us/reports-plans>

If the system is providing the service agreements through a publicly available webpage, provide a brief description of the types and number of agreements here:

LLS maintains agreements with adjacent library systems, including Arrowhead (Rock County), Kenosha County Library System (Kenosha County), and the Bridges Library System (Jefferson and Waukesha Counties)

Other Types of Libraries

Wis. Stat. § 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.

The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. The system will provide a copy of the agreement with a list of all signing libraries to the Division by January 15.

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide the URL here:

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide a brief description of the types and number of agreements here:

ASSURANCES (cont'd)

Library Technology and Resource Sharing Plan

Wis. Stat. § 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.

The system will provide the current plan for library technology and resource sharing to the Division by January 1, 2020. See the Library System Technology and Resource Sharing plan webpage for more information.

If the system is providing the current technology and resource sharing plan through a publicly available webpage, provide the URL here:

https://www2.lakeshores.lib.wi.us/technology

Is the plan current and comprehensive for the technology and resource sharing services the system provides?

Yes, the library system technology and resource sharing plan is current and comprehensive for the technology and resource sharing services the system provides.

No, the library system technology and resource sharing plan is not current or comprehensive for the technology and resource sharing services the system provides or will provide.

If no, describe what the system has added, changed, or eliminated from the plan in effect (and describe how the changes were reviewed with member libraries and approved by the system board):

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

Significant collaborative projects with the Southwest Wisconsin Library System will be added to the 2020 technology plan.

Professional Consultation

Wis. Stat. § 43.24(2)(h) Professional consultant services to participating public libraries.

Identify consultants, specific service areas, and related activities. If the consultant is employed by a member library, indicate the library and the consultant's title:

David Dowling (Library Technology, Integrated Library System)

Vicki Keith (Interlibrary Loan, Reference)

Janice Martin (Administration, Budgets, Human Resources)

Jim Novy (Library Technology, Technology Budgets, TEACH Program, Integrated Library System)

Steve Ohs (Administration, Budgets, Municipal Relations, County Relations, Director Searches, Continuing Education).

Jennifer Puccini (Childrens & YA Services) - Burlington Public Library.

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

None.

Inclusive Services

Wis. Stat. § 43.24(2)(k) Promotion and facilitation of library service to users with special needs.

The Division interprets services to users with special needs as inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community, including services to individuals or groups for whom using the public library is difficult, limited, or minimized.

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

There are no new activities expected for the plan year. LLS will continue to facilitate library services for users with special needs when requested by member libraries, and on an ongoing basis for job-seekers through the Gale Courses partnership with member counties.

Other Service Programs

Wis. Stat. § 43.24(2)(i) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library system board after consultation with participating public libraries.

List each "other" service program individually with ongoing activities and new or priority activities for the plan year under each program. For instance, if the system provides a bookmobile service program, list ongoing activities and new or priority activities for the bookmobile program. (Do not lump miscellaneous activities under a single "other" program.)

LLS' primary other service program is the SHARE Consortium. LLS continues to serve as the designated "Agency of Support"

ASSURANCES (cont'd)

for SHARE. In this role, LLS provides fiscal agency, administrative and technical support for the consortium. In a practical sense, this means operating the integrated library system software (including local customizations), providing the fiscal structure for funding the software, and advising the SHARE Director's Council on matters relating to the ILS software and governance issues. Though LLS does not make significant direct contributions of funding to SHARE, LLS does commit substantial resources to the consortium in the form of staff salaries & benefits.

Administration

- The system will not expend more than 20 percent of state aid received in the plan year for administration.
 - The system will submit the 2019 system audit to the Division no later than September 30, 2020.
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Budget

- The system completed and included the budget by service program category and fund source for the plan year ([see guidelines](#)).
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COLLABORATIVE ACTIVITIES

Summary of Activities *Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2020 resource library contract.*

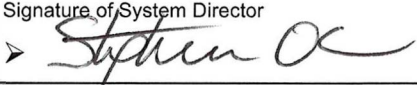

LLS is once again participating in the statewide OverDrive e-material collection, as well as the SEWI (SouthEast Wisconsin) continuing education partnership. These comprise the majority of cost/benefits realized by LLS. This being the case, LLS has also engaged in closer partnerships with the Arrowhead Library System and Southwest Wisconsin Library System relating to local IT support. As a result LLS has realized several thousand dollars worth of cost/benefits in the form of equipment upgrades that benefit all three systems.

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

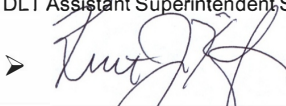
Activity	Amount
1. WPLC Digital Collection	\$1,097,547
2. SEWI Continuing Education Program	\$11,435
3. Equipment Upgrades Through LSTA Collaborative Projects w/ ALS & SWLS	\$5,000
4.	
5.	
6.	
7.	
8.	
9.	
10.	
Cost Benefit Total	\$1,113,982

CERTIFICATION

WE, THE UNDERSIGNED, CERTIFY that to the best of our knowledge, the information provided in this document and any attachments is true and correct, and that the system will be in full compliance with all applicable provisions of Chapter 43 of the Wisconsin Statutes for the year **2020**.

Name of System Director Stephen Ohs	Signature of System Director 	Date Signed Mo./Day/Yr. 9/17/19
Name of System Board President Jane Brossard	Signature of System Board President 	Date Signed Mo./Day/Yr. 9/17/19

**FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature 	Date Signed Mo./Day/Yr. 11/1/2019
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Comments

**PUBLIC LIBRARY SYSTEM 2020
ANNUAL PROGRAM BUDGET**

Program	2020 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
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Technology, Reference, and Interlibrary Loan*

1. Technology	\$74,642	\$0	\$23,100	\$125,000	
2. Reference	\$0	\$0	\$0	\$0	
3. Interlibrary Loan	\$72,380	\$0	\$0	\$0	
4.					
5. Electronic Resources	\$8,000	\$0	\$0	\$114,469	
Program Total	\$155,022	\$0	\$23,100	\$239,469	\$417,591

Continuing Education and Consulting Service*

1. Continuing Education	\$4,000	\$0	\$0	\$0	
2. Consulting	\$69,586	\$0	\$0	\$0	
Program Total	\$73,586	\$0	\$0	\$0	\$73,586

Delivery Services	\$102,324	\$0	\$0	\$58,426	\$160,750
Library Services to Special Users	\$0	\$0	\$0	\$0	\$0
Library Collection Development	\$8,799	\$0	\$0	\$0	\$8,799
Direct Payment to Members for Nonresident Access	\$0	\$0	\$0	\$4,341,281	\$4,341,281
Direct Nonresident Access Payments Across System Borders	\$0	\$0	\$0	\$79,492	\$79,492
Library Services to Youth	\$30,700	\$0	\$0	\$0	\$30,700
Public Information	\$6,558	\$0	\$0	\$15,000	\$21,558
Administration	\$128,663	\$0	\$0	\$0	\$128,663
Subtotal	\$277,044	\$0	\$0	\$4,494,199	\$4,771,243

Other System Programs

1. SHARE Consortium	\$161,216	\$20,000	\$0	\$235,179	\$416,395
2. Other Programs	\$13,326	\$0	\$0	\$45,000	\$58,326
Program Total	\$174,542	\$20,000	\$0	\$280,179	\$474,721

Grand Totals \$680,194 \$20,000 \$23,100 \$5,013,847 \$5,737,141

* These programs may be divided into subprograms at the discretion of the system. If choosing not to use subprograms, enter amounts on line 1. Line 5 is reserved for the amounts budgeted for electronic resources ([see program budget guidelines](#)).